Commercial Intelligence Journal

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Trade Conditions: Britain, U.S.A., Australia, Italy, Etc.
Change in Canadian Cheese Box Opposed in London
Notes on Automobile Trade in the West of England
The Market Situation in the British West Indies
Exports of Canadian Goods to New Zealand Increase
Butter and Cheese Market Situation in Belgium
Present Exchange and Financial Conditions in Brazil
Trade Inquiries for: Fish, Provisions and Canned Goods; Fish Oils; Lumber; Paper (Various Kinds); Woodpulp; Building Materials; Paints; Yarns; Etc.

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

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Hon. J. A. ROBB

DEPUTY MINISTER
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COMMERCIAL INTELLIGENCE SERVICE
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TABLE OF CONTENTS

Commercial Intelligence Journal

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Canadian Manufacturers and Exporters are strongly advised to file all numbers of the "Commercial Intelligence Journal" for future reference, and to bind them with the Index at the end of each half year

TRADE COMMISSIONER P. W. WARD'S VISIT TO CANADA

Mr. P. W. Ward, Canadian Trade Commissioner in Singapore, is now in Ottawa, and his itinerary for Eastern Canada will shortly be arranged. Canadian firms who are desirous of being brought into touch with Mr. Ward, or of interviewing him, are requested to communicate with the Director, Commercial Intelligence Service, Ottawa, in order that the necessary arrangements may be made.

EXTENSION COURSES IN EXPORT TRADE

With reference to the notices which have appeared in the *Commercial Intelligence Journal* advertising the Extension Courses in Export Trade which are to be held at McGill University and the University of Toronto in January, some changes have been made in regard to that part of the series of lectures and demonstrations which is to be conducted by officers of the Commercial Intelligence Service. Advantage has been taken of the presence in Canada of Mr. W. J. Egan, Canadian Trade Commissioner at Cape Town, Mr. G. R. Stevens, Canadian Trade Commissioner at Kingston, Jamaica, and Mr. P. W. Ward, Canadian Trade Commissioner at Singapore, to secure their assistance. The experience these gentlemen have had in foreign markets and their co-operation in the series should make the courses not only more interesting, but also more practical.

The Director, Ecole des Hautes Etudes Commerciales, Montreal, has decided to hold an Extension Course at the School similar to that which is being held at the Universities above mentioned. This course will commence about the middle of February; the exact date to be announced later. The Department of Trade and Commerce will co-operate with the Ecole des Hautes Etudes Commerciales.

TRADE CONDITIONS IN THE UNITED KINGDOM

Trade Commissioner Harrison Watson

London, December 15, 1922.—The commercial barometer marks a slight rise, and several developments which have occurred quite recently have tended to improve the outlook.

Causes are the result of the general election, and the consequent replacement of the Coalition by a single-party Government with an absolute and considerable majority; the substantial relief to unemployment by the adoption of extensive Government schemes which will also incidentally give work to British factories; a slight increase in activity in home trade; the definite settlement of Irish autonomy; and better prospects of the satisfactory arrangement of affairs on the Continent. Signs are the phenomenal jump in the value of the £1 sterling, as indicative of the greater stability of British credit, and the largest monthly foreign trade returns for some time past.

Industrial conditions, however, still continue to be very uneven, because while there are distinct proofs of greater activity in the iron and steel trades and coal, and some improvement in the shipbuilding industry—which is further stimulated by the placing of orders for two new ironclads on the Tyne, Mersey and elsewhere—and an increase in enquiries is reported in other branches, November remained a very disappointing month for the cotton and allied trades, while several other industries continue to mark time. The recent annual reports of several of the leading enterprises in the country still exhibit very disappointing results, entailing in several cases the passing of dividends.

A feature which deserves some attention is the cessation in the fall in wholesale prices, which commencing in September, has now been succeeded by a rise which already averages about 4 per cent, and while largely due to certain foodstuffs, also includes most materials.

As regards overseas trade for November, the imports, valued at £95,600,143, show an increase of £10,000,000 over October, £6,000,000 over the previous November, and are the highest figures since February, 1921.

In the case of exports, the augmented value for November was practically £7,000,000 over October, £3,000,000 better than November last, and the best since March, 1921. Both furnish definite proof of some development in the volume of transactions, even if, upon closer inspection, the higher figures are mainly due to larger imports of wheat and other foodstuffs, and heavy exports of coal.

Upon reference to the figures of imports for November, it is found that receipts of almost all Canadian products mark a strong increase over a year ago, and as might have been anticipated, arrivals of wheat have been exceptionally large.

IMPORTS OF CANNED SALMON

A less satisfactory item which strikes the eye is that whereas during the month only 5,767 cwts. of canned salmon were imported from Canada and 7,370 cwts. from the United States, deliveries from "other countries" (which in this case must chiefly mean Siberia) aggregated no less than 155,001 cwts. It will be known that the canned salmon trade was formerly a Pacific Coast monopoly, and its altered nature is further shown by the returns for the eleven months of this year, when imports from this new source provided 334,133 cwts. as against 276,703 cwts. coming from Canada and the United States combined, of which Canada itself furnished the somewhat meagre total of 49,401 cwts.

LONDON TRADE OPPOSED TO ANY ALTERATION IN THE CANADIAN CHEESE BOX

Trade Commissioner Harrison Watson

London, December 12, 1922.—At one time complaints were constantly being made about the damaged condition in which Canadian cheese boxes reached importers in the United Kingdom, but resulting from the adoption of better methods, there has since been a marked improvement, and while cases of breakage occasionally happen, these have become much less frequent.

The question, however, crops up periodically, and the increased volume of business secured by New Zealand cheese in this country has caused a suggestion in certain quarters that a factor in this success is the superiority of the New Zealand crate over the Canadian box. This has led to an offer from the Forest Products Laboratories, acting in the interests of the Canadian cheese trade, to make a series of tests on the present Canadian box, and also upon a new type of box which it has been suggested in Canada might advantageously replace it, but as a preliminary this office was requested to secure information as regards the harm being done to the Canadian cheese industry in England through the poor condition in which the cheese arrives, and whether there is any advantage in having the box in its present size and shape.

Our own experience was that the London trade is pretty well satisfied with the condition in which Canadian cheese boxes now arrive, and that whereas the crate is considered suitable for the New England cheese, there has been no general demand that it should replace the Canadian box, while, further, any such alteration would be foreign to the well-known conservative traditions of all trades in this country.

In order, however, to thoroughly test the matter, it was decided to consult the Secretary of the Home and Foreign Produce Exchange, Ltd., a body which includes in its membership practically all important wholesalers engaged in the butter, cheese and provision trades in all its branches, and as that official considered the subject of the highest importance, he kindly offered to ascertain the views of his members.

After a most exhaustive investigation, it has been found that the trade is totally opposed to any departure from the size and shape of the box which has so long been associated with the Canadian cheese trade, and for the information of makers and shippers, it is thought interesting to reproduce the letter received from the Secretary to this effect, as follows:—

"This matter has now been very carefully considered by all sections of the trade, and the unanimous opinion is that the present size and shape of the box is quite suitable and should therefore be continued, but it is particularly pointed out by the Wholesale Section that the boxes coming from the factories in the western provinces are better than those from other districts, especially those from the Quebec factories, which leave much to be desired. I am to add the recommendation that pulpwood should not be used under any circumstances for the manufacture of the cheese boxes.

"In the course of the inquiry attention was drawn to the large number of lids which become broken and detached in handling, and I am to ask if means cannot be found to more securely fasten the lids."

NOTES ON THE AUTOMOBILE TRADE IN THE WEST OF ENGLAND

Trade Commissioner A. B. Muddiman

Bristol, December 8, 1922.—As in many other lines of products, the most marked feature of the commercial motor vehicle market in this area to-day is the decline in prices. Here again, as in other lines of commodities, the decline is gradual and steady, and not abrupt. The slump in heavy motor vehicles is the general cry of the trade in this area. This is largely due to there being so many ex-army lorries still in use and upon the market. As a result the trade here believe the heavy vehicle business will take a long time to recover.

THE "ONE-TONNER" SUPREME

The market is much quicker on "one-tonners" than on heavier motor vehicles because: (1) only one man is required to handle the one-tonner, while for vehicles over two tons, two men are required in order to comply with the Trades Union rules; (2) in the case of short runs in towns, the "one-tonner" provides ample load capacity, and is more economical to run than a "two-tonner" which is often too big for the load to be carried, particularly in the retail trade. There appears to be, according to agents in this area, very little demand for "two-tonners," for, as stated above, they are too big for "one-tonner" loads and not large enough for "three-tonner" work when a really good freight is secured.

In looking to this market in regard to "one-tonners," Canadian manufacturers should remember they have to compete with the Ford "one-tonners" which are manufactured in England. The commercial motor truck market in this area, agents state, is controlled by British manufacturers; though, as will be mentioned later, there are a few importations from the Continent, but not nearly so many in the West of England as might be anticipated from the present rates of exchange existing between Great Britain and Continental countries.

TYPES ON THE MARKET

The Oldsmobile "one-tonner" is said to be selling. The General Motors of Canada's "one-tonners" and "two-tonners" from Canada are also seen. The usual English types in use are the Leyland, the Thornycroft, Carrier, A.E.C., Tilling-Stevens, Dennis, Bristol, and Halley. One agent stated that the reason the General Motors' "two-tonner" was selling in spite of the lack of real demand for this type was due to the fact that it has many special features. "One-tonners" should be able to compete with Fords in order to be marketable here. They must not be landed in England at over £360 less 20 per cent discount for the trade to look at them, and as much under as possible.

It should be remembered that the Canadian ton of 2,000 pounds being 240 pounds short of the English ton, a Canadian "two-tonner" is not really classed as a "two-tonner" but as a 36-cwt. vehicle.

The only trucks which can at present compete to any extent with those of British manufacture are said to be, according to some agents, the Italians and Germans, who are able to do so owing to the present rates of exchange. It has been reported in the *Daily Express* for November 30, that Sir John Thornycroft, the famous motor engineer, and head of the firm of T. J. Thornycroft & Co., Ltd., said recently that "it may be a surprise to many people to know that an average of about two German commercial vehicles a day have

been imported during this year." If this is so, it must be entirely due to the rate of exchanges. Very few German commercial vehicles are to be seen in the streets of Bristol.

NO DUTY ON COMMERCIAL VEHICLES

There is no duty on foreign commercial motor vehicles used in the course of trade, including public passenger vehicles. On the other hand motor vehicles other than commercial pay a duty of $33\frac{1}{3}$ per cent, while those motor vehicles manufactured entirely in Canada are entitled to a rebate of one-third the full duty in the case of non-commercial vehicles.

Though in this area the English-made commercial car prevails, it is learned from inquiries made in Birmingham and Coventry, two of the most famous seats of this industry in the United Kingdom, that the export aspect of the English motor trade is not perhaps so strong as prior to the war. It may be said that if British makers can manufacture as cheaply and as well as American and Continental competitors, they should be able to recover their foreign markets. But the marketing of cars does not depend on cars alone, but also on the facilities given with them so far as service depots, supplies of spares, etc., are concerned. Where users in a foreign field have adopted types in large numbers, they often prefer to continue to use them, for their agents have been able to organize and establish good auxiliary services so necessary for the motor trade. Therefore in foreign markets the English manufacturer is finding keen competition from the Americans who displaced them in war days, and also in some places from Canadian and Continental makers.

NEED OF FINISH

Two cars, one English and the other Canadian, were taken, at about the same price, so that an examination into the relative finish as required for this market might be carried out. The English car is selling at approximately £75 more than the Canadian; but, in the opinion of the agent who handles both, though the English make fetches £75 more than the Canadian, the latter in actual value as a car is worth £75 more than the English make for a purchaser. The spread between the actual prices is accounted for, however, in the different methods of finishing the respective cars off for the consumer. The English car had the crank case polished, also its base plate. Its handles were nickel finished and also its bonnet catches. The doors of the body had lockers fitted to carry tools, etc., while the back of the body opened to carry luggage. On the other hand, in the Canadian car the base and crank cases were painted a grey colour, which, no doubt, is a real workmanlike method of finishing, but does not attract the buyer's eye in this area.

When making cars in Canada for the English market, Canadian manufacturers should bear the following in mind. Take, for example, a really good strong car with a fine engine and back axle: if it is left with a rough finish it will not fetch a price so high as a common car well finished, simply because it does not appeal to the eye. In the first case an excellent running car is offered, whilst in the second, when it is a question of the purchaser's luck whether a good power unit has been acquired or not the finish has been the deciding factor. This aspect applies equally to commercial or pleasure cars. The best English manufacturers run their products about in highly finished motor trucks, regarding a fine fleet of trucks as an advertising asset.

CANADIAN MAKES IN ENGLAND

It is particularly in Birmingham and district that, so far as this area is concerned, the home car production is very strong. At the recent motor car exhibition at Olympia in London it is claimed, for instance, in Birmingham that out of the total stands which numbered over 300, more than a third were representative of the Birmingham district.

From this it will be appreciated that cars, both passenger and commercial, to be sold in this area must be able to compete in quality, price, delivery, etc., in so far as the most exacting demands require. The mere fact that some Canadian makes are being sold gives a gratifying proof of the ability of Canada in this regard. On the other hand, it does not furnish any justification for the belief that any Canadian make can be sold. Only factories willing to lay out money on investigation and capable of turning out cars that can "buck" a stiff market should turn their attention to this area for export sales. Indeed, so far as this office can ascertain, the present is not an entirely favourable time for launching a new make, or even automobile accessories.

On the other hand, those Canadian makes that are already in, it is pleasing to report, are well received. The Canadian Buick is claimed to be a very good proposition, and is said by the trade here to be somewhat better finished than the United States one. Agents receive repeat orders from those owners who make a practice of buying a new car each year. The four-cylinder type is particularly liked. The Chevrolet is also giving satisfaction. In Bristol the agent says at the moment of writing thirty are urgently required. The Oakland, etc., are also selling favourably.

SPECIALLY FITTED CARS

This area, as elsewhere in Great Britain, has always a demand for specially fitted cars. Dashboard novelty fittings to-day represent one of the phases of motor fashion. Indeed, the standard car in England is not the rage, but that make which embodies some new fashionable craze.

As a subsidiary to these few brief notes on the automobile market, it should be added that the question of the sale of motor tractors was also considered. Unfortunately there is very little sale for them here. This is possibly due to the hard time the English farmer is going through: also, and more permanently, to the fact that the farmers around this area are mostly in too small a way to undertake their purchase.

CONDITIONS IN THE UNITED STATES

Frederic Hudd, Trade Commissioner in the United States

New York City, December 21, 1922.—According to a Bradstreet report business failures in the United States during the month of November reached a total of 1,758—an increase of 10 per cent over the total for October and the largest total reported since last May. Compared with November a year ago, failures were 10·7 per cent fewer in number, and over four times as many as in November, 1919.

There has, however, been no appreciable decline in business activity. During November 761 new companies were formed, with an average authorized capital of over $100,000, or representing a total of over $800,000,000. This makes the highest point reached in several months. The output of steel continues to be maintained and the seasonal slackening generally anticipated at this time promises to be less than in any year since 1917. The United States Steel Corporation has increased its operations at several points since the beginning of the month, and improved transportation conditions have permitted the freer movement of finished products from the mills. The paper trade reports good demand for all grades, and there is a continuance of the increased output in the automobile trade. The year's production of automobiles to the end of November has exceeded the total for any previous year in the history of the industry. Other indications of the maintenance of activity in business are the

large amount of building construction still being carried on and the continued decrease in unemployment. More coal is now being produced than at any previous time during the year, although in some districts the shortage of cars is preventing a larger movement. United States exports in November were the highest of the year, reaching a total of $383,000,000, about $90,000,000 more than the exports in November, 1921. Against these indications of a continued improvement in business must be noted a check in the expansion of bank clearings and a drop in bond values.

Prices again rose in November, according to the Bureau of Labour Statistics. measured by the bureau's weighted index number, which included 404 commodities or price series, the increase from the general level of the month before was $1\frac{1}{3}$ per cent. Owing to advances in the price of grain, cotton, hay, eggs, sheep and wool, prices in the farm products group rose $3\frac{1}{2}$ per cent. Food and clothing advanced 2 per cent.

After remaining at par during the last weeks in November, the Canadian dollar was at a discount of $\frac{1}{32}$ per cent in the New York market on December 1, and there has been a slightly varying increase in the discount up to the present.

MARKET CONDITIONS IN THE BRITISH WEST INDIES

Trade Commissioner E. H. S. Flood

Barbados

Barbados, December 7. 1922.—During November considerable activity was in evidence in business circles as compared with October, partly due to the approach of the holiday season. An appreciable increase was shown in the amount of customs duties collected during the month as compared with the corresponding month of last year, which indicated that a recovery to some extent was taking place, and that the lowest level of business depression had been passed. No doubt the increase in the rates of customs duties imposed in the early part of the year may account for part of the additional revenue collected. but there was nevertheless a greater quantity of goods imported.

The prospect of a good crop in 1923 has gone a long way to restore general confidence, both among the planters and commercial bodies, and also in respect of the banks. Of last year's crop of molasses a small quantity is yet unsold.

Advices at the time of writing are to the effect that the breadstuffs and provision market is in good supply of flour, cornmeal, and generally of other foodstuffs, including cod and pickled fish. The supply of lumber and cooperage stuffs is ample for the demand.

Bank exchange on Canada on December 1 was buying rate $3\frac{7}{8}$ per cent premium, and selling $6\frac{7}{8}$ per cent premium.

Trinidad

The provision market conditions were reported on the 21st and again on the 28th November as being "bright" as regards foodstuffs, and were expected to continue so for some time. Dealers were receiving large consignments of new stocks for the holiday season by nearly every incoming steamer. On the 28th there was an advance in the price of flour, as a result, as it was stated, of increased prices in the Canadian and United States markets. Oats, meal, butter, cheese, and condensed milk were in supply, as were also codfish and haddock.

The prices of cocoa have dropped a point or two since last month, and it is thought that the quotations will go lower. Sugar crop returns for the year

up to the 1st November show a total production of 59,948 tons, and an export up to the same date of 50,058 tons. Shipments of coconuts show improvement, with prices unchanged. Shipments of asphalt continue steady and are greater than in any period since 1917. The oil exported during the month exceeded 8,000,000 gallons and was probably a record.

The question of taxing commercial travellers is now under consideration by the Chambers of Commerce of Trinidad and Barbados. The matter is still being considered in committee by both chambers, and while it is urged by a certain element in the chambers, has been criticized and met opposition. Should the resolution pass, the tax, if imposed, will probably be quite light.

Demerara, British Guiana

A very necessary measure has recently been passed by the Government of British Guiana to compel the registration of business names. The Attorney General in introducing the bill stated, by way of explanation, that one of the sections was intended to give protection "to members of the public in this colony and abroad, who are dealing with persons who had rather imposing letter heads with all sorts of business names, titles and addresses. People abroad had been mislead into giving credit and doing business on these imposing letter heads. The effect of this bill will be to prevent that sort of thing, and people will not be able to conceal their identity under the guise of an imposing anonymity."

Last month attention was called to the number of applications for trade marks which were being advertised in the *Official Gazette* of the colony by firms in the United Kingdom and the United States. In the last issue of the *Gazette* the number of such advertisements increased to over one hundred, covering twenty-two pages. The articles advertised were chiefly tobacco, soaps, spirits, cement, and pretroleum products, and four were for perfumery and toilet articles by German firms.

[A table giving quantities of the principal articles imported into British Guiana from the United Kingdom, Canada, and the United States from January 1 to October 31, 1922, has been transmitted by Mr. Flood, copies of which may be obtained on application to the Director, Commercial Intelligence Service, Ottawa (quoting file No. T.C.-3-101).]

CUBAN MARKET FOR CERTAIN CANADIAN PRODUCTS

J. L. Gonzalez-Hoyuela, Office of the Trade Commissioner

Havana, December 15, 1922.—*Codfish*.—Sales are very limited. Canadian codfish is quoted at $9.25 and $9.50 c.i.f. Canada, and Norwegian codfish at from $10.50 to $12 c.i.f. A Norwegian steamer arrived in this port some ten days ago bringing 5,900 cases. Weekly arrivals of Canadian cod from Boston are between 400 and 1,000 cases.

Potatoes.—This market is completely demoralized owing to large consignments of potatoes arriving here unsold, and a decline in prices has taken place. In the past ten days there were heavy arrivals, totalling some 80,000 sacks from different sources, among them New Brunswick and Prince Edward Island. Sales are being made at present upon the basis of $2 and $2.25 c.i.f. The present stock here is estimated at from 50,000 to 60,000 packages.

Wheat Flour.—There is a rather large stock in this commodity. First Patent Spring wheat is being sold at around $9. Quotations on American flour are very high, and Canadian flours can successfully compete with them.

Hay and Oats.—Canadian exporters of these commodities have also an opportunity to compete with their American competitors in these lines.

IMPORTS INTO NEW ZEALAND FROM CANADA

Mr. W. A. Beddoe, Canadian Trade Commissioner in Auckland, New Zealand, under date December 6, 1922, reports that according to official trade returns of the Dominion of New Zealand the total value of imports into New Zealand for the quarter ending September 30, 1922, was £424,877 ($2,124,385)—an increase over the corresponding quarter of the previous year of £234,952 ($1,174,760), when the figures stood £189,925 ($949,625). The principal increases and decreases were as follows:—

Increases.—Fish preserved in tins, £2,579; chocolate in fancy packages, £1,809; apparel and ready-made clothing, £24,556; boots and shoes (other), £12,556; hosiery, £16,814; fencing staples, £2,003; nails (other), including dog spikes, £5,761; wire fencing, plain, £7,124; wire fencing, barbed, £9,450; wire, iron n.e.i., £5,171; reapers and reapers and binders, £4,154; insulated wire and cable, £3,634; timber sawn dressed (other), £4,090; woodenware and turnery n.e.i., £3,437; printing paper, £21,148; wrapping paper, £4,658; rubber tires, tubes and covers, £8,556; passenger vehicles other than buses, £103,568.

Decreases.—Corsets, £8,026; iron and steel—bar, bolt and rod, £1,316; bolts and nuts, £2,995; hardware, hollow-ware and ironmongery, £3,084; wrought iron pipes—6-inch and under internal diameter, £29,816; bare copper wire £2,038; paperhangings, £7,519.

[An exhaustive cable showing the values of various lines of imports into New Zealand from Canada, together with articles affected by and the value of Canadian preference, for the quarter ending September 30, 1922, has been transmitted by Mr. Beddoe and placed on file in the Department of Trade and Commerce, Ottawa, where it is available for interested Canadian firms on application to the Director, Commercial Intelligence Service (quote file T.C.-3-100).]

AUSTRALIAN FINANCIAL CONDITIONS

Trade Commissioner D. H. Ross

Melbourne, November 21.—The last report under the above heading went forward on October 24 and in the interval no development of importance has occurred.

The leading banks have arranged to finance the wheat crop, and no serious difficulty is likely to happen in connection with financing the extensive shipments of Australian wools now being made from the principal shipping ports throughout the Commonwealth. Money rates continue high, and the various large lending corporations report a strong demand from all quarters for fixed loans at 6 to 6½ per cent per annum.

No definite arrangement has yet been arrived at in regard to the transfer of the huge accumulation of funds held by Australian banks in London, but it is possible that this serious position may be the subject of special legislation at the first session of the new Parliament to be elected on December 16.

Imports for the three months ended September 30 show an increase of £10,220,875 over the corresponding period of the previous year. The principal increases were in dry goods, tinned fish, oils, iron and steel, motor cars, rubber goods, lumber, china and glassware, paper, drugs and chemicals, and musical instruments. Imports exceeded exports by £10,073,115. Exports decreased by £3,527,059, due to lesser shipments of butter, wheat, flour, and greasy wool. The total imports for the quarter were £31,251,453, and the exports for the same period were £22,188,338.

The condition of the wheat crops in Australia can now be more safely gauged, and—in the opinion of experts—the estimated yield of the Common-

wealth is in the vicinity of 103,500,000 bushels as compared with 128,971,000 bushels in 1921-22. The record yield of wheat in Australia was in 1915-16, when 179,065,703 bushels were produced.

With the near approach of mid-summer, and the Christmas demand for special lines of imported goods, wholesale distributors are experiencing activity in practically all branches of trade.

The country is now in the throes of a keenly contested political campaign which culminates at the general elections throughout the Commonwealth on December 16.

VICTORIAN GOVERNMENT'S ELECTRICAL SCHEME

TRADE COMMISSIONER D. H. ROSS

Melbourne, November 21, 1922.—In sequence to the numerous reports from this office, which have appeared in previous numbers of the *Commercial Intelligence Journal*, relative to the large quantities of electrical equipment required by the Victorian Government in its scheme for utilizing the brown coal deposits at Morwell for electrical power, Canadian manufacturers are now advised that further tenders are being invited for the supply and delivery of transformers, tension coils and bushings.

Particulars of the requirements are briefly outlined thus:—

SPECIFICATION NO. 23/8

Supply and delivery, free of all charges, as specified of the following:—

(1) Three 25 K.V.A. 3-phase, 50 cycle oil insulated, self-cooled, transformers, 6,600 volts delta to 415/240 volts star complete with oil.
(2) Six 50 K.V.A. 3-phase, 50 cycle oil insulated, self-cooled, transformers, 6,600 volts delta to 415/240 volts star complete with oil.
(3) Six 100 K.V.A. 3-phase, 50 cycle oil insulated, self-cooled, transformers, 6,600 volts delta to 415/240 volts star complete with oil.
(4) One complete set of the spare low and high tension coils and the necessary insulation required for one leg of one transformer of each rating.
(5) Three spare high-tension bushings complete.
(6) Three spare low-tension bushings complete.

DATE OF CLOSING OF TENDERS

Tenders—on the prescribed form—should be addressed as first-class mail matter to the Secretary of the State Electricity Commission of Victoria, 22-32 William Street, Melbourne, Australia, in time to reach their destination on or before March 31, 1923.

CHARGES FOR SPECIFICATIONS

The specifications covering the requirements and appended contract forms may be inspected at, and copies obtained from, the Department of Trade and Commerce, Ottawa (refer to file No. 26502).

The Electricity Commission makes a charge of 5s. ($1.21) for the first two copies of the specification, and for each additional copy a charge of 2s. 6d. (61 cents). The first fee is returnable upon receipt of a bona fide tender, but that for extra copies is not.

DEPOSITS ON TENDERS PAYABLE IN CANADA

As in the case of previous specifications, to facilitate the interests of Canadian tenderers, the Electricity Commission has arranged with the Department of Trade and Commerce, Ottawa, that the amount of the preliminary deposit required to be deposited with each tender can be made in Canada. The deposits

are to be paid to the Accountant of the Department of Trade and Commerce, Ottawa, and his official receipt only need be forwarded with the tender to Melbourne. The sum required to be so deposited in this instance is 1 per cent of the total tender price.

The elimination of the more circuitous methods of deposits being sent to Australia, and possibly being returned to Canada, makes the payment in Canada a convenience alike to the Commission and the tenderers.

THE ITALIAN SITUATION

Trade Commissioner W. McL. Clarke

Milan, December 8, 1922.—A much healthier tone is pervading Italy's economic life. There is a general feeling with the Fascisti Government in power that the days of bureaucratic rule, unproductive administration and contradictory state policies are over. Moreover, at no time since Caporetto has the writer observed in Italy such an enthusiasm for hard work, economy and discipline. The Government itself has received from the Senate and the Chamber a carte blanche with full powers to carry on the affairs of state up to March, 1924. In the meanwhile much is to be undertaken and the programme includes the redressing of the budget, drastic economies, the denationalization of at least some of the public services, the more equable incidence of taxation, the revitalizing of agricultural and industrial production and the upholding of Italy's dignity abroad. Already the threatening law of 1920 rendering the registration of bearer securities compulsory has been abrogated, while on the other hand Mussolini's pledged word has been given that past foreign treaties will be loyally respected. Even if then the economic task before the country is gigantic, and even should the effecting of the Fascisti programme not be unaccompanied by temporary setbacks, the salient fact remains that the national problems are now at least definitely appreciated by a Government backed by the best public opinion. Gradually at least, the writer believes, the corresponding solutions will be satisfactorily worked out.

The industrial situation shows several signs of improvement. Strikes are virtually non-existent, and unemployed figures have again fallen and now stand at some 312,714. The iron and steel industries are busier than a few months ago. The knitted goods branch of the textile industry is exceptionally brisk, while the auto industry is working overtime and is booked for months ahead. Capital investment, however, fell off slightly in October (some 29 million lire), and business failures are still accumulating, some 339 being registered for the month of October, bringing the total for 1922 up to 2,908. On the financial side it is noted that state revenue is still on the incline, bank deposits are heavier, and clearing house receipts for October at 58 billion lire are about 15 billion lire higher than the average for the early months of this year. On the other hand, the most recent figures—viz., those for the end of September—show that there has been a slight increase in both paper currency and treasury notes.

The exchange rates are perhaps the most encouraging economic feature of the past month as the lira appreciated from 23.05 to the United States dollar on the 1st of November to 20.95 on the 30th and at date of writing it has practically touched 20. The improved political situation, and most probably a curtailment in speculation at the Government's injunction, are largely responsible.

The commodity markets are not so lethargic as at the 1st of November and more business is being transacted. Main prices are for the most part firm. On the Bourse, Government bonds and bonds of companies holding Government

stocks moved appreciably upwards while silk, hemp and sugar securities are also considerably higher. Cotton and woollen textile scrips became less valuable due largely to the falling off of Italy's export demand in the Near Eastern markets. Of the 78 securities quoted on the Milan Bourse, 48 moved up during November some 1,003 points, 27 went down 760 points, and 8 remained stationary.

During the month of October a special commercial treaty was signed with France which ensures Italy the advantages of the minimum French tariff while granting certain favourable terms to French imports.

The cost of living in Milan continues to rise and is 1·12 per cent higher than a month ago.

THE BUTTER AND CHEESE SITUATION IN BELGIUM

Trade Commissioner A. S. Bleakney

Butter

Brussels, December 7, 1922.—Before the war, when the dairy herds of Belgium were not depleted, that country imported slightly over 6,500 tons of butter and exported almost 1,000 tons, principally to France. Holland, a dairying country, supplied almost 3,500 tons, Britain about 800 tons, and France about 200 tons. After the Armistice there was of course a great demand for food products of all kinds, and Dutch butter continued to control the market. The total importations for 1919 were slightly over 5,000 tons, of which Holland supplied 3,717 tons, the United States 571 tons, Canada 354 tons, and Denmark 295 tons.

The principal feature of the trade in 1920 was the growth of imports to 8,376 tons and the appearance of Danish butter on the market to the extent of 2,687 tons. Dutch imports were practically the same as the previous year, while United States shipments improved to a figure just under 1,000 tons, and Canadian dropped to 227 tons. Butter shipped from the United Kingdom, probably of overseas or Irish origin, appeared on the market for the first time since the war, to the amount of 367 tons—not quite half the pre-war quantity.

In 1921 Belgium absorbed a still greater amount of foreign butter, imports reaching 10,280 tons. Holland shipped 6,191 tons, while butter from the United Kingdom was responsible for 2,000 tons, that country again taking second place as a supplier of butter to Belgium. United States shipments during this year were practically negligible, and Canada only shipped 47 tons. Danish butter was still very much in evidence, the shipments from that source accounting for 1,813 tons.

Dutch butter at present, as shown by the importations up to September of this year, easily dominates the situation, with sales of 6,900 tons, and is followed by Denmark with 4,670 tons. United Kingdom shipments were roughly 3,500 tons, whereas United States and Canadian butter has practically disappeared from the market. It is of course probable that some of the butter coming from England is Canadian; much of it is from New Zealand.

CAUSES FOR DECLINE IN CANADIAN IMPORTS

The principal reason for the falling off in sales of Canadian butter is the fact that the market preference is for an unsalted butter, while Canadian shipments are salted, and these must always be sold at a discount. It would appear also that more initiative on the part of Canadian butter exporters would not be without results, although the natural irrigation of the Dutch polder gives the Dutch creameries an advantage in the longer period of green pasturage.

But a representative of the Department of Agriculture of the province of Quebec recently concluded an arrangement with a firm in Brussels for the exclusive sale of the butter of the Coopérative Centrale des Agriculteurs de la Province de Québec. It has been represented to this office by an authority that unsalted butter was made in Ontario for the English market.

The Canadian Trade Commissioner's office is at the disposal of Canadian firms wishing to ship butter to this market. Firms or co-operative bodies writing in this connection should give the fullest particulars and conditions of sale in their first letter. Correspondence from bodies prepared to export unsalted butter is especially requested.

Other reasons for the practical disappearance of Canadian butter from the Belgian market are to be found in price, distance of Canada from Belgium, and the exchange. The second element, that of distance, resulting as it does in delays to deliveries, accentuates the speculative element in the other two, as well as tempting stiffer conditions of payment, which entail the locking up of capital for long periods. These are of course elements in the situation which it is not within the power of the Canadian exporter to change. The Dutch can offer better terms, as, with their personal knowledge of the market, they can easily arrange to liquidate refused goods. One method of endeavouring to overcome these disadvantages would be to select a reliable house and consign butter to them, so that they may have it in stock and thus be enabled to take advantage of fluctuations in exchange and price in order to increase sales. The consignment business, however, is one that must be worked up gradually and with great caution at the present time, as it is difficult to secure connections with real price-getters, many agents being only too willing to dispose of the goods at a poor figure in order to secure their commission. The possibilities of dealing through English merchants should not be lost sight of.

PROFITS OBTAINABLE

To give an idea of the margin of profits obtainable, on November 15 creamery butter was quoted in Montreal at 37 cents a pound, or $81.40 per 100 kilogrammes. Adding to this $1.32 for ocean freight, $1.40 for duty (at 20 cents per 100 kilos), gives $84.12 as the landed cost per 100 kilos of butter in Antwerp, plus marine insurance, customs, brokerage and warehouse charges. The rate of exchange on November 15 was 16 francs to the dollar, the value of the goods in francs being thus 1,345.92. The average price of Danish, Dutch, and Belgian butter wholesale in Belgium on November 15 was 15 francs the kilo, or 1,500 francs the 100 kilos, leaving a margin of 154 francs for profit and incidental charges. It should be mentioned here that this rate of 16 francs is above the average, the exchange now averaging about 15 francs, leaving a better working margin.

Cheese

The Flemish element in Belgium being of Dutch origin and tastes, it is not surprising, particularly in view of the proximity of the two countries, that Dutch cheese has been, and is now, the most popular on the Belgian market. In 1913, of a total importation of 13,644 tons, Holland supplied 11,664 tons. Switzerland shipped 840 tons of Gruyère, Emmenthal and other varieties, and France 840 tons, while Britain shipped 118 tons, mostly of the Cheddar variety—probably largely Canadian. The Belgians themselves produce a considerable quantity of very soft piquant cheese known as "Herve."

Canada and the United States were able to ship very large quantities of cheese in 1919, when there was a great scarcity of food products in the country and importation was controlled by the Belgian Government. Of a total importation of 7,502 tons in that year, Canada shipped 2,403 tons, the United States

3,403 tons, while Holland was only able to furnish 1,225 tons. France and Britain furnished smaller amounts, 212 and 121 tons respectively.

In 1920 Dutch cheese again came into its own, supplying nearly three-fourths of the total importations of 12,609 tons. Canada, however, was able to maintain her trade to the extent of 2,261 tons, but United States imports fell off badly, the total reaching only 784 tons. French shipments improved to 314 tons, while those from other sources were nominal.

In 1921 Belgian importations increased to 15,516 tons, of which Holland supplied 13,389 tons—approximately her pre-war quota. Canadian shipments were about half the pre-war quantity, Swiss imports increased to 418 tons, and France shipped 211 tons.

A further growth in the importations of cheese into Belgium has been shown in 1922, these up to September totalling 16,000 tons. Dutch cheese has maintained its popularity and is responsible for 14,000 tons. Some 342 tons of French cheese, and 159 tons of cheese shipped from England, were purchased by Belgium during this period, whereas Canadian shipments fell to 318 tons.

DECLINING SALES OF CANADIAN CHEDDAR

In discussing this situation with Belgian importers, various reasons were advanced for the declining sales of Canadian Cheddar shipped direct from Canada. These, however, were not very illuminating, and were the usual complaints of high exchange, price, quality of certain shipments, speculative features, and onerous sales conditions. One importer points out that even when cheese is shipped cash against documents Antwerp, the mere act of purchasing future dollars entails the locking up of a considerable margin.

In regard to price, Dutch Edam cheese sells retail here around 6.50 fr. the half-kilo.; Swiss cheese, Emmenthal, 8 fr. the pound; Brie, a French cheese, 6 fr. the half-kilo.; whereas Cheddar cheese, known here as Chester, sells around 5.50 fr. the half-kilo.

MARKET PARTIALITIES

From personal investigations made by this office, the opinion is expressed that if Canadian firms would ship small loaves of about 25 to 30 pounds, known in the trade as triplets—ship them green and have them paraffined to keep them from drying out—the cheese would sell much better in the Belgian market. The Belgian likes a moist cheese, and the great proportion of Dutch cheeses on sale in the shops here are fresh and moist in appearance. The 80-pound loaves of Cheddar, as currently sold in the stores here, become so dried out, caked and cracked, that they become most unattractive and unappetizing in appearance. The majority of Belgian working men have a cheese sandwich for lunch; this consists of a large slice of cheese between generous slabs of bread, and for this *tartine*, as it is called, the workman likes a moist cheese which he can almost spread on the bread. For cooking purposes Rochefort or Emmenthal is nearly always used.

PRICE, FINANCIAL ARRANGEMENTS AND PACKING

Recently, Canadian cream of Cheddar in small 5-pound loaves covered with tin foil has appeared on the market. This sells here retail at 14 fr. the kilo. and is taking very well. It is very little different from an ordinary Cheddar except that there is a certain amount of butter fat added, the tin foil conserves the moisture, and the small loaf is suitable to the size of the average Belgian purchase, which is about a quarter-pound. Any Canadian firm offering such cheese, or triplets of ordinary Cheddar, will be put in touch with importers here on application to the Trade Commissioner.

The general consensus of opinion among the cheese importers interviewed is that Canadian cheese, to compete with Dutch, must sell at a lower price. This preference for Dutch cheese would be minimized under the conditions specified above.

Financial difficulties might be avoided by consigning the goods to reliable firms in England for resale here on quick deliveries, comparable to Dutch deliveries. Indeed, the large deliveries from England this year may be the result of Canadian and New Zealand firms utilizing well-known United Kingdom firms and British-Dominion banking facilities in England as a means of overcoming the financial difficulties of shipping direct.

Attention of cheese importers is also directed to the matter of wire strapping their cheese boxes. A full report on the packing requirements of this market was given in *Weekly Bulletin* No. 930 (page 874), and will also be found in the pamphlet recently issued by the department, *Packing for Overseas Market*. copes of which may be obtained by interested Canadian firms on application to the Director, Commercial Intelligence Service, Ottawa.

THE NEW TEXTILE FABRIC

An interesting development in the cultivation of the "Arghan" fibre was reported at the annual meeting of the Arghan Company, says *Kelly's Monthly Trade Review*, when the Chairman stated that the company has now a nursery of 60 acres of flourishing plants, and that they had succeeded in spinning the Arghan fibre into 5,700 yards per pound, having thereby proved that the fibre can be spun to an infinitely finer count than was at first held possible, while satisfactory results have been achieved in dyeing, weaving and manufacturing various cloths, which, when submitted to master textile experts at Dundee and Belfast and in Lancashire had obtained their fullest appreciation. The company now intend to cultivate the Arghan fibre on a very extensive scale. Many rubber plantation companies have entered into agreements about co-operation in the production of the fibre on a large scale, and the company will place free of charge young Arghan plants for an area of 10 acres to each company. This, then, is the interesting and satisfactory result of strenuous exertions on the part of the promoters of this highly-important fibre, the value of which is certainly enhanced by stating that the cost of cotton just now is about £130 per ton and flax £180, while Arghan, stated to be superior to both of these fibres, can be produced at considerably less than half the cost of either and still yield a very handsome profit to the cultivator.

FARM MACHINERY NEEDED FOR SPAIN

A valuable opportunity is opened up for British makers of agricultural machinery to extend their sales in this market, says the *British Export Gazette*, but it is necessary to insist that only the right types have any chance of acceptance by the Spanish agriculturist. American farming plant unquestionably suits the conditions. The soil is generally sandy, and wheel tractors are liable to get clogged; hence track-laying types are more popular. Ploughs of two- and three-gang types are mostly used, and disc harrows are preferred to other sorts. Spain, however, is a receptive market for any types of agricultural machinery, and new models are welcome. It is for the manufacturer to study the soil conditions, which are by no means uniform throughout the country, and to introduce types that meet special local requirements. Spain is a conservative country, but industrially it is rapidly emerging from the ruts in which it has been for centuries, and is adopting modern ideas in whatever direction they appeal to the practical instincts of the people.

THE EXCHANGE SITUATION IN BRAZIL

TRADE COMMISSIONER E. L. McCOLL

Rio de Janeiro, December 6, 1922.—When all the factors which affect Brazilian exchange are studied, the wonder is that it remains as high as it is. When the last Government came into power in 1919 the milreis stood at $14\frac{1}{2}$d. When the new Government took over the reins exchange was $6\frac{5}{16}$d. Some of the factors pertaining to Brazil which caused the fall were: internal trade depression, the falling off of dividends of foreign capital invested in Brazil, not sufficient exports in comparison with imports and a consequent lack of foreign bills, extravagant spending of money on non-productive projects such as the exposition, the centenary celebrations, lavish entertainment of foreigners, and valorization schemes which called for enormous issues of paper money. The unsettled political situation which resulted in a slight outbreak of revolution in July and the *estado de sitio* (a mild kind of martial law) which followed and is still in force did not help matters. Then came the fiscalization of banks. A Government inspector was placed in each bank and his sanction was required before any exchange transactions could be made. This inspector was supposed to follow regulations governing exchange transactions laid down by the Government Inspector-General of Banks. New regulations for the fiscalization of banks and exchange were issued and were of such a nature that they had to be withdrawn, as banks out of protest refused to deal in exchange. This interference with the free dealing in exchange undoubtedly accompanied the other factors in keeping down the value of the milreis.

The new Government came into power without a trace of disturbance. This, together with its proclaimed policy of retrenchment, economy, and promotion of industry creating a feeling of confidence and hope, caused a 12 per cent increase in exchange, i.e. from $6\frac{1}{4}$d. to 7d. However, this rise was of short duration. It was simply sentimental. At that time foreign bills were scarce. Coffee exports were not the cause of the rise, as might have been assumed. Exchange has now reacted, having fallen to $6\frac{3}{8}$d. Part of this decline is the natural reaction to the rise which had no other foundation than sentiment, and part is due to the Finance Minister's report on the bad state of the finances of the country.

UNSTEADINESS OF EXCHANGE

Exchange has seldom been so unsteady as at the moment of writing. During the last few hours it has strengthened to the extent of 300 reis, but by to-morrow it may have fallen again. The following factors will have an influence on its future course. The greatly increased foreign debt calls for the yearly payment of 300,000 contos ($36,000,000) interest and amortization. The Government will require to go into the market to buy this foreign exchange. The Bank of Brazil were heavy buyers of foreign exchange during the last few months of office of the late Government. The bank was without doubt buying for Government account. It has been said that the last Government had all foreign obligations paid up to March, 1923. If this is the case, it means that a very large buyer will not require to come into the market for some time. This promising feature should give exchange a chance. It must also be remembered that there will probably be a favourable balance of trade of $90,000,000 at the close of the present year. Fiscalization of exchange has now been almost completely withdrawn.

A fact that should not be overlooked is that much depends on whether the President will be able to live up to the admirable programme of economy and work which has been outlined. As he continues in office he will become more

and more subject to the opposition which his policy will create. If he remains firm to his purpose and carries out the high-minded development of Brazil's resources, improvement will soon manifest itself. At present the exchange market is highly sensitive and erratic and will probably continue to be so for some months to come, not only on account of the known financial difficulties but also on account of the many unforeseen political and economic factors which may arise at any moment.

FINANCIAL SITUATION IN BRAZIL

Major E. L. McColl, Canadian Trade Commissioner in Rio de Janeiro, has forwarded the following summary of a report of Dr. Sampaio Vidal, the new Minister of Finance, made to the President of the Republic and presented to Congress on November 30, 1922, on the Brazilian situation.

The report, while disclosing the serious state of affairs, has been received with satisfaction, inasmuch as the frank statement of figures, accompanied with an appeal to Congress and to the people to support the executive of the nation in a programme of rigid economy in order to restore the finances of the country to a more stable basis, has done much to clear the air of the uncertainty and uneasiness which has lately permeated the atmosphere.

The report first calls attention to the present disorganized state of the world and the enormous efforts which all foreign statesmen have been making in order to bring about the economic re-establishment of their respective countries. Mention is made of the lessons to be learned from England, France, Belgium, etc., by a study of the rigorous programmes which these countries have mapped out and steadfastly endeavoured to follow. The report then explains how Brazil, which in 1914 was staggering under the endeavour to pay off her debts, instead of profiting by the example set by other countries, has since that time continued by an audacious policy of extravagance to plunge the country into increased indebtedness and additional responsibilities, some of which are unwarrantably burdensome. Loans which have recently been made are unhappily exhausted. The following is a summary of the figures given:—

	External debt	Paper at exchange of 8d.
External loans	£140,017,631-0-0	4,200,524 : 729$470
	Internal debt	
Consolidated—		
Government bonds	1,575,095 : 400$000	
Floating: bills, etc.	734,508 : 601$804	
Savings bank	128,500 : 000$000	
		2,438,104 : 001$804
Paper money in circulation		2,226,275 : 997$000
		8,864,904 : 728$274
		($1,063,788,567)
Annual interest on external debt, bonds, amortization and commissions		304,504 : 427$274
NOTE.—One Real is written		Rs. 0$001
One Milreis is written		Rs. 1$000
One conto of reis (one thousand milreis) is written and is equal to about $120.		Rs. 1. 000$000

The deficit for the current financial year is expected not to be less than two hundred thousand contos of reis ($24,000,000). Attention is called to the annual interest of more than three hundred thousand contos and a floating debt of more than seven hundred thousand contos, more than one million contos ($120,000,000) in all, confronting the Government and demanding immediate solution. An optimistic calculation of revenue is estimated at 500 to 550 thousand contos paper and 70 thousand contos gold (300 contos paper). Against this, public expenditure will most certainly exceed 900 thousand contos.

Then follows under eight headings the plan to be pursued in the endeavour to make revenue and expenditure balance. A better administration for the collection of taxes is to be instituted. It is estimated that over one hundred thousand contos is lost annually by unlawful evasion. Suspension for two years of all work, which without prejudice can be postponed, is another important clause. Attention is then drawn to the many partially developed resources of the country and the necessity of increasing the production of such products as cotton, sugar, tobacco, cattle, iron, etc.

The report ends in an optimistic spirit, pointing out that the vast resources of Brazil can and will be developed with the co-operation of all Brazilians and foreigners who participate in the destinies of Brazil. Attention is drawn to the gold balance on exchange of this year, which will certainly exceed twenty million pounds sterling.

THE IMPORT TRADE OF JAMAICA FOR 1921

Trade Commissioner G. R. Stevens

III

BISCUITS

The statistics of import for biscuits only cover soda crackers, pilot bread, and similar unsweetened biscuits; sweet and fancy biscuits are classed as confectionery in Jamaican reports. Canada's gain in volume in 1921 is noteworthy, and is due in no small measure to the activities of one or two well-known Canadian manufacturers whose biscuits are being pushed by aggressive agents. It is well recognized that Canadian biscuits are better quality for the money than American crackers, which largely emanate from New Orleans, and the replacement of American supplies is entirely a matter of salesmanship.

(e) Biscuits.

		1920	Percentage	1921	Percentage
United Kingdom		£22	5%	£14	fractional
	lbs.	416	5%	274	fractional
United States		£319	79%	£8,650	92%
	lbs.	6,390	79%	173,010	92%
Canada		£70	16%	£735	8%
	lbs.	1,399	16%	14,688	8%

(f) Butter.

		1920	Percentage	1921	Percentage
United Kingdom		£3,110	7%	£722	2%
	lbs.	18,914	7%	5,978	2%
United States		£15,108	35%	£7,096	20%
	lbs.	86,336	35%	58,711	20%
Canada		£14,751	33%	£21,262	58%
	lbs.	84,292	33%	175,954	58%
Denmark		£5,822	13%	£3,462	9%
	lbs.	33,269	13%	28,655	9%

BUTTER

The figures show a considerable gain to Canada in 1921, with a corresponding decline in American business. In the present year, Canada's proportion promises to be even greater. With the exception of some small shipments of fresh butter in cold storage from New York, the imports in 1920 and 1921 consisted of tinned butter, which is by all odds the most popular in Jamaica; and the bulk of the supplies from Canada in both years was represented by a well-known brand shipped from Halifax. The name of this butter has long since become a household word in Jamaica.

There is, however, a limited field for fresh butter. With the advent of the C.P.O.S. *Sicilian* in the early part of 1922, Canadian fresh butter began to arrive in bulk and in cartons in cold storage. Canadian exporters found the

long freight haul plus the cost of tins to be prohibitive for all except the very best grade of butter; accordingly they adopted the 1-pound carton, and shipped in cases of 50 to 100 pounds, wirebound. Local importers, however, preferred half-barrels or tubs. The *Sicilian* has unfortunately been withdrawn from this route, and a very promising trade has abruptly ceased. Some Jamaican importers, however, hope to be able to get down Canadian fresh butter via New York by the United Fruit Company's steamers, by which route the total freight would probably be the same as via St. John.

(g) Butter Substitutes.

		1920	Percentage	1921	Percentage
United Kingdom		£13,827	41%	£5,457	33%
	lbs.	184,360	41%	93,554	33%
United States		£14,189	42%	£4,331	26%
	lbs.	189,193	42%	74,240	26%
Canada		Nil		Nil	
Holland		£5,775	13%	£4,797	27%
	lbs.	77,004	13%	82,235	27%

Oleomargarine was the chief item of import under this head. This product is extensively used in Jamaica for cooking purposes, but no supplies come from Canada.

(h) Milk, Condensed.

		1920	Percentage	1921	Percentage
United Kingdom		$873	fractional	£82	fractional
	lbs.	19,296	fractional	1,452	fractional
United States		£115,169	95%	£79,158	61%
	lbs.	1,982,817	95%	1,438,541	61%
Canada		£2,332	2%	£52,921	39%
	lbs.	47,616	2%	880,607	39%

Condensed milk is a staple article of diet in Jamaica, and competition in the sale of this line is very keen. The bulk of the trade is controlled by the Nestle and Anglo-Swiss Condensed Milk Company, which have their own distributing agency in Kingston. In 1920 they drew most of their supplies from the United States, but in the following year they made fairly large imports from Canada. Practically the only competition which the Nestle products encounter comes from a well-known Canadian brand which has been on the Jamaican market for some years, and which now secures a fair proportion of the trade. Both these milks are extensively advertised throughout the colony. Of late, one or two other Canadian brands have entered the field, but their sales to date have been small.

12. FOODSTUFFS, OTHER

(a) Cheese.

		1920	Percentage	1921	Percentage
United Kingdom		£413	3%	£1,100	5%
	lbs.	7,084	3%	17,594	5%
United States		£12,519	85%	£15,044	72%
	lbs.	214,620	85%	240,712	72%
Canada		£2,021	12%	£4,162	19%
	lbs.	34,640	12%	66,581	19%

Canada's share of this trade, while still small, shows a gratifying increase in 1921, and should be capable of still further improvement. Cheese is sold through manufacturers' representatives and also through large wholesalers who buy outright. The need for proper packing must be emphasized; the accepted method in the Jamaican trade is one cheese to one box, with a good fit, the cheese being about 20 pounds in weight.

(b) Confectionery.

	1920	Percentage	1921	Percentage
United Kingdom	£27,802	63%	£18,953	65%
United States	12,761	29%	6,128	28%
Canada	3,031	7%	1,989	7%

Imported confectioneries are mostly of high quality. Cheap local sweetmeats obtain a fair share of the market, particularly in the rural districts and in street sales in the towns. An extraordinary amount of these local sweets is consumed. The only cheap imported candy which is prominent in Jamaica is assorted buckets of low grade bulk mixture manufactured by a Massachusetts firm whose trade mark is "*Yankee*." The demand for this latter candy is considerable and should interest any Canadian manufacturers in a position to export a low-grade product. The imports of high-grade confectionery consist largely of the famous British boiled candies which encircle the globe. The sweets of the cocoa manufacturers are unvarying in quality moderate in price and unfailing in endurance. In addition to hard boiled sweets and toffees, tinned chocolates come forward from British sources in large quantities and no amount of competition would dislodge such items from popular favour. The box chocolates imported are largely Canadian, and the attractiveness of Canadian packages secures a fair volume of business not only in preferential countries and in Spanish republics but even in the face of American preference in Cuba. In addition to boxed chocolates, a much larger volume of business could be developed in bar chocolate of the many luscious combinations which are manufactured in Canada at present. The three-penny or five-cent bar could be pushed much further through advertising and better distribution.

(c) Hams.

		1920	Percentage	1921	Percentage
United Kingdom		£3,751	12%	£2,910	16%
	lbs.	28,133	12%	29,106	16%
United States		£26,681	88%	£14,560	82%
	lbs.	200,111	88%	145,598	82%
Canada		£27	fractional	£20	fractional
	lbs.	2,038	fractional	199	fractional

The demand for hams is entirely high class and only the best British and American products are marketed. Due to superior advertising, special packing for the tropics and general reputation, the American packers have held this field to date and it is improbable that Canadian hams will effect any particular lodgment in Jamaica in the near future.

(d) Jams and Jellies.

	1920	Percentage	1921	Percentage
United Kingdom	£5,580	44%	£2,291	46%
United States	6,745	54%	1,901	40%
Canada	32	fractional	529	11%

Standard British and American jams and jellies have been sold in Jamaica for a long period and a great deal of spade work is necessary before Canadian supplies can cut into this trade to any marked extent. A small business is being done by one or two Canadian manufacturers at present. The great advantage of the British goods is in appearance and in packing. The second advantage, not so noticeable in Jamaica as in other parts of the West Indies, is the use of a cheap tin instead of the more expensive bottle. A third point in favour of British goods is their ability to keep their prices a fraction under current American quotations through the advantage of preferential tariff. None of the foregoing advantages are beyond the reach of Canadian manufacturers.

Strawberry, raspberry, and currant jams in one-pound bottles with screw tops are popular. The demand for larger sizes and for five- and ten-pound tins is negligible.

(e) Lard and Lard Substitutes.

		1920	Percentage	1921	Percentage
United Kingdom		£257	1%	£380	3%
	lbs.	3,424	1%	9,128	3%
United States		£16,970	99%	£10,608	97%
	lbs.	226,263	99%	254,590	97%
Canada		Nil	....	£91	fractional
	lbs.			2,180	fractional

Lard is feeling the impact of vegetable oils in Jamaica as elsewhere, and the domestic business in this product is fairly limited. The bakers, however, use considerable quantities of lard imported in tierces. During the past year one Canadian packer has been offering lard and obtaining a fair volume of business. It is probable that, in spite of the presence of branch houses of two American pork packers, this Canadian firm will continue to increase their business in tierce lard. In smaller containers the prices of the American importers have been more favourable to date.

(f) Meats, Canned.

	1920	Percentage	1921	Percentage
United Kingdom	£4,121	27%	£1,279	26%
United States	9,895	66%	3,342	66%
Canada	365	2%	83	2%

The demand for canned meats in Jamaica is limited; what business there is goes to well-known British and American packers. Small containers —½-pound and 1-pound—are essential.

(g) Pork, Wet Salted.

	1920	Percentage	1921	Percentage
United Kingdom	Nil		Nil	
United States	£53,776	100%	£26,927	100%
brls.	5,021	100%	4,191	100%
Canada	£186	fractional	£32	fractional
brls.	17		5	

This product is in fair demand in Jamaica, and is imported in barrels of about 200 pounds. Business at present is done almost exclusively with the United States, but as noted under hams, Canadian packers could obtain a share of this trade by selling at competitive prices and offering attractive business terms. It should be remembered that in this product Canada now enjoys a preference of 1s. 10d. in a general duty of 7s. 6d. per 100 pounds.

(g) Potatoes.

	1920	Percentage	1921	Percentage
United Kingdom	£194	2%	£885	8%
brls.	106	2%	172	8%
United States	£3,685	45%	£6,037	55%
brls.	2,019	45%	3,348	55%
Canada	£4,042	49%	£3,720	34%
brls.	2,215	49%	5,621	34%

As Jamaica does not grow sufficient potatoes for her needs, the imported article is in constant demand, the trade being shared between Canada and the United States. The latter is in a somewhat better position to supply the Jamaican market, on account of more frequent steamship communication. Potatoes are imported in barrels of about 160 pounds, and the bulk of the trade is handled by retailers who purchase direct from suppliers abroad.

(h) Sugar, Refined.

	1920	Percentage	1921	Percentage
United Kingdom	£ 5	fractional	£ 31	fractional
United States	4,779	33%	19,297	80%
Canada	1,883	12%	21	fractional
Costa Rica	8,415	55%	4,583	19%

With the exception of the supplies from Costa Rica—which were light-coloured vacuum pan sugars brought in by a Jamaican firm to meet the special needs of its business—the imports in both years were of the white granulated type. The demand for this grade of sugar is comparatively small, being restricted to the upper classes. The business available, however, should be worth having, and Canadian refiners could certainly obtain a portion of it if they tried. Small quantities of Canadian granulated sugar have lately been shipped to Jamaica from Halifax.

(i) Tea.

		1920	Percentage	1921	Percentage
United Kingdom		£7,071	63%	£5,525	70%
	lbs.	53,044	63%	51,000	70%
United States		£3,012	27%	£1,920	25%
	lbs.	22,597	27%	17,738	25%
Canada		£668	6%	£101	1%
	lbs.	5,010	6%	951	1%

Most of the tea imported from the United Kingdom originated in India and Ceylon, and were more or less of high grade; the American supplies were of cheaper quality. The consumption of tea in Jamaica is restricted to the upper and middle classes, and is therefore not large. The imports from Canada represent only casual shipments.

(j) Provisions, n.o.p.

	1920	Percentage	1921	Percentage
United Kingdom	£12,956	51%	£ 6,034	32%
United States	10,722	40%	10,262	56%
Canada	304	1%	866	4%

The imports under this heading include such articles as pickles, sauces, vinegar, macaroni and breakfast foods, grape juice, and culinary essentials. To date a very small portion of such supplies have been drawn from Canada, but with aggressive effort the steady replacement of American goods should ensue in such lines as macaroni, breakfast foods, baking powder, grape juice, vinegar, and similar goods. The supply of pickles, sauces, and similar luxury condiments will, of course, remain with the United Kingdom.

ALL-RUSSIAN EXHIBITION, 1923

The Commissariat of Agriculture of the Russian Government have informed the British Commercial Mission of their intention to organize an All-Russian Agricultural Exhibition to be held from August 15 to October 15 next year.

The objects of the exhibition are stated to be the illustration of: (1) the present state of Russian agriculture; (2) the possibilities of development in the industrial treatment of agricultural produce; (3) the achievements of agricultural science throughout the world; (4) the advantages which foreign industry can afford to Russian agriculture.

It is proposed to group exhibits under the following main headings: Agriculture, Forestry, Cattle Breeding, Land Settlement, Colonization, Export, Foreign Agricultural Industry and Equipment, and Peasants' Handicraft.

During the exhibition various conferences on agriculture and allied subjects will be held, including a conference on "dry" agriculture, which it is hoped will be attended by foreign representatives.

Prizes will be awarded for exhibits, which will be carried to and from the exhibition at a reduced tariff and will be admitted duty free.

VALPARAISO A TEXTILE IMPORTING CENTRE

Textiles to a large extent are imported into Chile through the port of Valparaiso and redistributed from there by the large importers, says the United States *Commerce Reports*. A greater amount of the standard goods, such as sheeting and canton flannels, is brought in direct by importing houses in various ports of Chile for sale in those cities, in the interior, and in the northern provinces, and to some extent for re-exporting to Bolivia. Merchants in Chile are accustomed to do business on long credits, and the granting of these will do much to influence orders.

MAILS TO WEST INDIES, CENTRAL AND SOUTH AMERICA

The Post Office Department has furnished a table of sailings from which the following information for the guidance of Canadian firms writing to the above countries has been compiled:—

Correspondence for the West Indies is forwarded by direct Canadian steamers or via New York, whichever route will give a quicker despatch, although letters marked for transmission by either route are forwarded in accordance with the endorsation.

Letters for Central America are forwarded via New York, with the exception of letters for British Honduras specially addressed "Via Halifax."

Letters for South American countries generally are also forwarded via New York, unless specially addressed "Via Halifax."

Following are sailings for the balance of the month of January:

For	*Via*	*January*
Antigua	New York	18, 20.
Argentina	New York	10, 13, 20.
Bahamas	New York	12, 19, 26.
Barbados	New York	18, 20.
Bermuda	New York	10, 13, 20, 27.
Bolivia and Chile	New York	11, 15, 20, 24, 25.
	New York	Every Wednesday.
Brazil, North	New York	13, 15, 17, 23, 27.
Brazil, South	New York	13, 15, 17, 23, 27.
British Guiana	New York	9, 17, 18, 20, 23.
Colombia	New York	11, 12, 15, 20, 24, 25, 26. Every Wednesday.
Costa Rica	New York	Every Saturday.
Curacao	New York	11 13, 18, 20, 25, 27.
Dominica	New York	13, 16, 24, 27, 28.
Dutch Guiana	New York	9, 17, 18, 20, 23.
French Guiana	New York	9, 17, 18, 20, 23.
Haiti	New York	15, 18, 19, 22, 25.
Jamaica	New York	12, 13, 19, 26, 27.
	New York	Every Wednesday and Saturday.
Martinique	New York	18, 20.
Nicaraqua	New York	Every Wednesday and Saturday.
Panama and Canal Zone	New York	11, 15, 20, 24, 25,
	New York	Every Wednesday.
Paraguay	New York	10, 13, 15, 20.
Peru	New York	11, 15, 20, 24, 25.
	New York	Every Wednesday.
Porto Rico	New York	Every Saturday.
Salvador	New York	11, 15, 24, 25.
	New York	Every Wednesday and Saturday.
St-Kitts-Nevis	New York	18, 20.
Trinidad	New York	9, 17, 18, 20, 23.
Turk's Island and Dominican Republic	New York	13, 16, 24, 27, 28.
Uruguay	New York	10, 13, 15, 20.
Venezuela	New York	11, 13, 18, 20, 25, 27.

GERMAN HARDWARE IN COLOMBIA

A Barranquilla correspondent writes that German hardware manufacturers are now making headway after the inactive war years, especially in small tools, while, on the other hand, they seem to meet with increasing difficulties in maintaining deliveries according to sale terms. Several Germans have again taken up activities in the coffee export trade, and it is reported from the interior of the country that sales of considerable areas of land suitable for coffee cultivation have recently been contracted on behalf of unknown purchasers by a Hamburg representative who has travelled over the country during the last three months. Colombia is gradually improving, as her export trade is certainly showing up, even increasing, chiefly owing to the good prices coffee exporters have lately experienced in the New York market.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING JANUARY 2, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement on the nominal closing quotations for all the principal exchanges for the week ending January 2, 1923. Those for the week ending December 26 are also given for the sake of comparison:—

		Parity	Week ending Dec. 26, 1922.	Week ending Jan. 2, 1923
Britain .. ..£	1.00	$4.86	$4.6875	$4.6941
France .. ..Fr.	1.	.193	.0746	.0749
Italy .. ..Lire	1.	.193	.0518	.0527
Holland .. ..Florin	1.	.402	.4019	.3986
Belgium .. ..Fr.	1.	.193	.0685	.0688
Spain.. .. .. Pes.	1.	.193	.1599	.1594
Portugal .. ..Esc.	1.	1.08	.0529	.0505
Switzerland.. .. .. Fr.	1.	.193	.1917	.1898
Germany .. .. Mk.	1.	.238	.000149	.000142
Greece .. .. Dr.	1.	.193	.0131	.0118
Norway .. .. Kr.	1.	.268	.1933	.1917
Sweden .. ..Kr.	1.	.268	.2723	.2732
Denmark .. .. Kr.	1.	.268	.2103	.2086
Japan .. ..Yen	1.	.498	.4942	.4950
India .. .. R.	1.	2s.	.3133	.3182
United States .. ..$	1.	$1.00	1.0087	1.0103
Mexico .. ..$	1.	.498	.4911	.4937
Argentina .. ..Pes.	1.	.424	.3845	.3851
Brazil .. .. Mil.	1.	.324	.1197	.1187
Roumania .. .. Lei	1.	.198	....	....
Jamaica .. ..£	1.	4.86	4.7058	4.6979
British Guiana .. ..$	1.	1.	.9816—.9841	.9806—.9831
Barbados .. ..$	1.	1.		
Trinidad .. ..$	1.	1.		
Dominica.. .. ..$	1.	1.		
Grenada .. ..$	1.	1.		
St. Kitts .. ..$	1.	1.		
St. Lucia.. .. ..$	1.	1.		
St. Vincent .. ..$	1.	1.		
Tobago .. ..$	1.	1.		
Shanghai, China .. ..Tael	1.	.708	.7237	.7249
Batavia, Java .. .. Guilder	1.	.402	.4035	.3952
Singapore, Straits Settlements .. $	1.	.567	.5548	.5556

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener (Ont.).

Foodstuffs

918. **Codfish and dried fish.**—A firm in Rome, Italy, would like to hear from Canadian exporters of codfish and dried fish.

919. **Lard, dried fish, soap products.**—A firm in Genoa, Italy, doing business as agents, would like to hear from Canadian exporters of lard, dried fish, and soap products.

920. **Herrings (smoked); salmon (canned); tomatoes (preserved); millo (for the manufacture of brooms), and sticks therefor.**—A reliable and active Havana commission merchant wishes to get in touch with Canadian exporters, so as to work them on a commission or brokerage basis.

921. **Canned lobster and wheat flour.**—A firm in Stockholm desire to get into communication with Canadian exporters of canned lobster and wheat flour.

922. **Provisions and canned goods.**—A firm in Rome, Italy, effecting payments against documents, would like to hear from Canadian exporters of provisions and canned goods.

923. **Canned goods, salmon, solid pack apples.**—A well-known Scandinavian canned goods merchant in Birmingham will act as agent, or buy direct, from Canadian cannery, salmon, and solid pack apples.

924. **Food products.**—A firm in Ancona, Peru, effecting payments against presentation of documents, would like to hear from Canadian exporters of food products.

925. **Tea, biscuits.**—A firm in Genoa, Italy, would like to hear from Canadian exporters of tea, biscuits.

926. **Lard and coal.**—A firm in Piedmont, Italy, desire to hear from Canadian exporters of lard and coal.

927. **Tropical products, oil seeds.**—A firm of agents or representatives in Genoa, Italy, would like to hear from Canadian exporters of tropical products, oil seeds.

928. **Casing products.**—A firm in Milan, Italy, would like to hear from Canadian exporters of casing products.

929. **Grain, agricultural seeds, etc.**—Well established Antwerp firm desire offers of clover and grass seeds, seed corns, wheat, rye, oats, barley, spelt, etc.

Miscellaneous

930. **Paper.**—A firm in Genoa, Italy, doing business on a commission basis is desirous of hearing from Canadian exporters of paper.

931. **Paper.**—A firm in Milan, Italy, desire to import paper from Canada.

932. **Paper and cardboards.**—A firm of wholesale dealers in Milan, Italy, would like to import Canadian paper and cardboards.

933. **Paper.**—A firm in Genoa would like to import paper from Canada.

934. **Paper and inks.**—A firm in Genoa, Italy, would like to import paper and inks.

935. **Assorted paper, envelopes and bristol cards.**—A firm of wholesale dealers in Milan, Italy, would like to hear from Canadian exporters of assorted paper, envelopes and Bristol cards.

936. **Paper and cardboards.**—A firm of representatives in Milan, Italy, would like to hear from Canadian exporters of paper and cardboards.

937. **Paper and coverings for books.**—A firm in Naples, Italy, doing business on a cash basis, would like to hear from Canadian exporters of paper and coverings for books.

938. **Newsprint.**—A firm in Santiago are interested in taking up an agency in Chile for Canadian mills exporting newsprint. This firm are interested in the agency for Santiago, Valparaiso and Concepcion.

939. **Newsprint.**—A Japanese firm in Tokyo, in good standing with all the large consumers of newsprint, are very anxious to receive supplies from Canada and wish to receive samples and prices from mills in a position to supply from four to five thousand tons a month regularly.

940. **Pasteboards, textile machinery, linen spun threads.**—A firm in Milan, Italy, doing business as agents, would like to hear from Canadian exporters of pasteboards, textile machinery, linen spun threads.

941. **Paper, leather, chemical and pharmaceutical products.**—A firm in Rome, doing business on its own account or on commission basis, would like to hear from Canadian exporters of paper, leather, chemical and pharmaceutical products.

942. **Paper, lumber and leather.**—A firm in Catania, Italy, would like to hear from Canadian exporters of paper, lumber and leather.

943. **Newsprint and wrapping papers.**—Havana, Cuba, commission merchants, wish to obtain the agency for Cuba of Canadian manufacturers of the above lines.

944. **Raw material for paper mills.**—A firm in Genoa, Italy, doing business against the opening of credit or payments on the delivery of goods, Genoa, desire to hear from Canadian exporters of raw material for paper mills.

945. **Woodpulp.**—A firm in Ruelle, France, wish to be put in touch with Canadian suppliers of woodpulp. So far have dealt in raw materials for stationery, old papers, rags, etc.

946. **Woodpulp.**—A firm in Turin, Italy, doing business as agents or on its own account, desire to hear from Canadian exporters of woodpulp.

947. **Lined cardboards.**—A well-known and responsible Japanese import house located in Tokyo, and having special connections with the Japanese Imperial Tobacco Monopoly Bureau, desires to receive samples and quotations from Canadian mills making lined cardboards and manila boards, specifications as follows:—lined flats, length 54½ inches or 59¾ inches; width, 35¼ inches, 32¼ inches, 19¾ inches rolled cardboard; length, 1,350 yards or over; width, 19¾ inches; thickness 13/1,000 inches up to 15/1,000 inches. Small samples of what are used in Japan for the manufacture of cigarette boxes have been received with this inquiry. The demand for this manila board runs into big quantities.

948. **Carbon paper.**—A Japanese firm in Tokyo desire samples and prices on Canadian carbon paper and typewriter ribbons immediately.

949. **Manila boards.**—A responsible import house in Tokyo specializing in the import of tobacco and supplies used by the Imperial Tobacco Monopoly Bureau would be glad to receive samples of manila board such as is used for making small cigarette boxes. Prices and full particulars requested immediately.

950. **Kraft wrapping paper.**—A leading import house in Tokyo interested in the import of paper, would be glad to hear from Canadian paper mills making kraft paper and in a position to export to Japan. Samples and prices requested immediately.

951. **Tropical products, hides and skins.**—A firm in Genoa, Italy, doing business on a cash basis, would like to hear from Canadian exporters of colonial products, hides and skins.

952. **Heavy hardware, nails, tubes, lard, bacon and packing house products, hay and oats.**—Havana commission merchant wishes to represent in the Cuban market Canadian manufacturers and dealers in the lines mentioned above.

953. **Building materials of all kinds, concrete mixers, paints and varnishes, sanitary fixtures.**—A Spanish architect who has been engaged in business in Cuba and is leaving to settle in Barcelona (Spain), desires to get in touch with Canadian manufacturers and dealers in the above lines who wish to be represented in that part of Spain.

954. **Knitting yarns.**—A large departmental store importing considerable quantities of foreign yarns would be glad to receive samples and prices of Canadian knitting yarns in various colours; something similar to the well-known Fleisher's yarns is what is wanted.

955. **Lumber.**—A foreign importer in Yokohama desires to hear from a reliable British Columbia exporter of lumber with the idea of forming business connections.

956. **Industrial products.**—A large firm of Danish importers are interested in industrial products, particularly mechanical and electrical engineering lines. Offers from Canadian manufacturers would be much appreciated.

957. **Raw materials.**—An important Danish concern is open to buy raw materials and semi-finished products for industrial purposes. Canadian exporters are requested to submit offers.

958. **Cobalt oxide or metal.**—A firm in Allevard, France, wish communications with Canadian importers of cobalt oxide or metal, with the carbon content below one per cent, if possible.

959. **Cod and other fish oils.**—A London company who specializes in lubricants are desirous of securing first-class sole agencies for the sale of Canadian cod and other fish oils.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From Halifax

To Queenstown and Liverpool.—*Andania,* Cunard-Anchor-Donaldson Line, Jan. 13; *Ausonia,* Cunard-Anchor-Donaldson Line, Jan. 29.

To Liverpool.—*Andania,* Cunard-Anchor-Donaldson Line, Jan. 13; *Canada,* White Star-Dominion Line, Jan. 20.

To Glasgow.—*Assyria,* Cunard-Anchor-Donaldson Line, Jan. 29.

To Londonderry and Glasgow.—*Assyria,* Cunard-Anchor-Donaldson Line, Jan. 29.

To Plymouth, Cherbourg, and Hamburg.—*Antonia,* Cunard-Anchor-Donaldson Line, Feb. 2.

To Newfoundland.—*Canadian Sapper,* Canadian Government Merchant Marine, Jan. 16.

To Bermuda, Barbados, Trinidad, and Demerara.—Royal Mail Steam Packet Co.'s ships, Jan. 19, and every fortnight thereafter.

To Guantanamo, Santiago (Cuba), and Kingston (Jamaica).—*Ottar,* Pickford & Black, Jan. 17.

To Barbados, Trinidad, and Demerara.—*Canadian Beaver,* Canadian Government Merchant Marine, Jan. 27.

To Santiago (Cuba), Kingston, Montego Bay and St. Ann's Bay (Jamaica).—*Andalusia,* Pickford & Black, Jan. 31.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—*Canadian Fisher,* Canadian Government Merchant Marine, Jan. 18.

To Australia and New Zealand.—*Canadian Constructor,* Canadian Government Merchant Marine, Jan. 20.

From St. John

To Manchester (via Halifax).—*Manchester Division,* Furness, Withy & Co., Ltd., Jan. 18; *Manchester Brigade,* Furness, Withy & Co., Ltd., Feb. 1.

To Liverpool.—*Marburn,* Canadian Pacific Steamships, Ltd., Jan. 19; *Canadian Seigneur,* Canadian Government Merchant Marine, Jan. 24; *Montclare,* Canadian Pacific Steamships, Ltd., Jan. 26; *Marloch,* Canadian Pacific Steamships, Ltd., Feb. 2.

To Glasgow.—*Canadian Carrier,* Canadian Government Merchant Marine, Jan. 11; *Metagama,* Canadian Pacific Steamships, Ltd., Jan. 13.

To London.—*Canadian Victor,* Canadian Government Merchant Marine, Jan. 24; *Cornish Point,* Furness, Line, Jan. 31.

To Cardiff and Swansea.—*Canadian Otter,* Conadian Government Merchant Marine, Jan. 13.

To Belfast.—*Ballygally Head,* Head Line, Jan. 25.

To Dublin.—*Carrigan Head,* Head Line, Jan. 21; *Ballygally Head,* Head Line, Jan. 25.

To Cork.—*Carrigan Head,* Head Line, Jan. 21.

To Avonmouth and Glasgow.—*Lakonia,* Cunard-Anchor-Donaldson Line, Jan. 13.

To London and Rotterdam.—*Essex County,* I.C. Transports, Ltd., Jan. 9; *Grey County,* I.C. Transports, Ltd., Jan. 20.

To Havre and Hamburg.—*Lord Dufferin,* I.C. Transports, Ltd., Jan. 13; *Welland County,* I.C. Transports, Ltd., Jan. 23.

To Rotterdam and Hamburg.—*Ramore Head,* Head Line, Jan. 15.

To Australia and New Zealand.—*Trevessa,* New Zealand Shipping Co., Jan. 25.

To South Africa.—*Palma*, Elder, Dempster & Co., Ltd., Jan. 20.

To Hull (via Halifax).—*Lexington*, Furness Line, Feb. 3.

To Cherbourg, Southampton, and Hamburg.—*Melita*, Canadian Pacific Steamships, Ltd., Feb. 10.

To Bordeaux and St. Nazaire.—*Lisgar County*, I.C. Transports, Ltd., Jan. 25.

To Australian Ports.—*Canadian Scottish*, Canadian Government Merchant Marine, Jan. 20.

From North Sydney

To St. John's (Nfld.).—*Kyle*, Reid-Newfoundland Co., Tuesday, Thursday and Saturday every week; *Sable I.*, Farquhar Steamship Co., every Saturday.

From Vancouver, B.C.

To Honolulu, Suva, Auckland, and Sydney.—*Niagara*, Canadian-Australasian Royal Mail Line, Jan. 26.

To Yokohama, Kobe, Shanghai, and Hong Kong.—*Empress of Australia*, Canadian Pacific Steamships, Ltd., Jan. 18.

To Yokohama and Kobe.—*Toyama Maru*, Nippon Yusen Kaisha, Jan. 10; *Hakata Maru*, Nippon Yusen Kaisha, Jan. 31.

To Yokohama, Kobe, Hong Kong, and Manila.—*Talthybius*, Blue Funnel Line, Jan. 27.

To Auckland, Melbourne, Adelaide, and Sydney.—*Hauraki*, Canadian-Australasian Royal Mail Line, Jan. 27.

To the Orient.—*Canadian Winner*, Canadian Government Merchant Marine, Jan. 31.

To London and Liverpool.—*Electrician*, Harrison Direct Line, Feb. 2.

To London, Glasgow, Liverpool, and Rotterdam.—*Loch Katrine*, Royal Mail Steam Packet Co., early January.

To London, Rotterdam, Hamburg, and Antwerp.—*Kinderdyk*, Royal Mail Steam Packet Co., end January.

TWO-BLADED SICKLE BAR FOR MOWING MACHINES

A double sickle, which, it is claimed, can be adapted, with slight adjustments, to any make of mowing machine, has been recently demonstrated by Tyzack Sons & Turner, Limited, of Sheffield, England. It consists of two complete sickle blades working one above the other, and eliminating the finger plate. All cutting is done between the two sharp edges, coming together instead of a cut against a stationary plate, as in the ordinary machines. The knives are almost self-sharpening. Some of the advantages that this double sickle is alleged to possess are that it will cut much closer to the ground and remove fog or dead grass; the machine does not clog or get choked up; and less horse-power is required than for the ordinary machine.

NEW INDUSTRIES IN NEW ZEALAND

Among the industries recently established in New Zealand, writes Vice Consul J. E. Moran in the United States *Commerce Reports*, are a glass factory; an industry for the expression of oil from native linseed, of which cattle cake is a by-product; a factory for the making of varnishes, enamels, and household-decorating specialties; and an industry manufacturing roofing tiles and insulators.

There are also possibilities of the establishment of mills for the manufacture of cotton piece goods; and a new mill is being erected at Auckland for the manufacture of wool and carpet rugs. While the manufacture of textiles in New Zealand has wide possibilities, there is at present a lack of skilled workers, but efforts are being made to overcome this condition by means of closer co-operation between the employers, the Department of Immigration, and the Board of Trade.

COMMERCIAL INTELLIGENCE SERVICE

(For list of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 248 St. James Street, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic.

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address, Canadian.*

Australia.

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium.

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil.

Major E. L. McColl. Address for letters—Caixa (P.O. Box) 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies.

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China.

J. W. Ross, Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba.

Address: 400 and 401 Teniente Rey 11, Havana. (Post-office Box 1290.) *Cable Address, Cantracom.*

France.

Lieut-Col. Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Holland.

Norman D. Johnston, Zuidblaak 26, Rotterdam. *Cable Address, Watermill.*

India and Ceylon.

Major H. A. Chisholm, M.C., P.O. Box 2003. Calcutta. *Cable Address, Canadian.*

Italy.

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica.

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan.

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

New Zealand.

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa.

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements.

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DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
Hon. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

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TABLE OF CONTENTS

Commercial Intelligence Journal

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TRADE COMMISSIONER P. W. WARD'S ITINERARY IN CANADA

Mr. P. W. Ward, Canadian Trade Commissioner in Singapore, is now in Ottawa, and the itinerary for his business tour in the Dominion has been partially arranged, as follows:—

Toronto	January 18 to 30.
Montreal	January 31 to February 14.
Brockville	February 16
Kingston	February 19 to 20.
Oshawa	February 21.
Guelph	February 22.
Hamilton	February 26 to 28.
Welland, St. Catharines and Thorold	March 1 to 3.
Brantford	March 5 to 6.
Galt	March 7.
Kitchener	March 8.
Stratford	March 9.
Windsor and Walkerville	March 12 to 15.
Chatham	March 16.
Ottawa	March 19.

Firms in Toronto and Montreal who desire to be brought in touch with Mr Ward, or to interview him, should direct their communications to him, care of Canadian Manufacturers Association, or the Secretary of the Board of Trade, in these cities, and in the case of Hamilton to the care of the Secretary of the Chamber of Commerce in that city. In all other cities and towns included in the itinerary, requests for interviews should be addressed to the Secretary of the local Chamber of Commerce or Board of Trade.

A tour to points in Quebec and the Maritime Provinces will follow, commencing at Sherbrooke on March 26, the details of which will be announced later.

PROSPECTS FOR CANADIAN BUTTER IN THE UNITED STATES MARKET

Frederic Hudd, Trade Commissioner in the United States

New York City, January 4, 1923.—The domestic supply of butter in this market is at present inadequate, and it is estimated that at the present rate of withdrawal holdings of butter in storage will be exhausted in six weeks. Large quantities of butter are being shipped from Denmark, Holland and the Argentine in addition to Canadian shipments, and one of the large wholesale dealers in New York has closed a contract for the importation of 120,000 boxes of creamery butter from New Zealand, 50,000 boxes of which are now being shipped for delivery this month for distribution in the New York market. It is the opinion among importers that the present shortage is in the neighbourhood of 19,000,000 pounds as compared with last year at this time, and that a very considerable period will elapse before a sufficiently large supply of domestic fresh butter to meet the requirements is available. The reserve stocks of butter in this country are very light, and the consumption in general has been in excess of production since the summer months. As a result, prices have advanced so

rapidly that, in spite of the duty on butter under the present tariff, butter can be imported profitably. The general sentiment in the trade seems to be that the market has reached its highest price for the time being, and that there is no possibility of the winter make of butter increasing sufficiently to meet current demand.

DANISH BUTTER

Danish butter is coming on the local market in moderate quantities and larger shipments are now on the way. From what can be learned, from 20,000 to 25,000 casks of butter were received here from Denmark in December, and more is likely to follow if there is sufficient difference in price as compared with Canadian or Californian butter. Importers are able to bring in the Danish product despite the "prohibitive" tariff of 8 cents per pound and still undersell the domestic product by about 1 cent, the market for the Danish holding at 51 to 52 cents. Many consumers prefer the Danish butter to the domestic. It has much less moisture content and a fine even texture, and the flavour is considered by some in the trade superior to the domestic. When the United States emergency tariff of 6 cents went into effect, sales of Danish butter were curtailed, but as the domestic prices became higher the imports increased. It was at first thought that the present tariff of 8 cents would absolutely prohibit the import of foreign butters, but on the facts this does not appear to be the case, in view of the large quantities of Danish butter sold to the trade within the past few weeks.

CANADIAN BUTTER

In addition to the large shipments received from Denmark, more business is likely to be done with New Zealand in the near future. Several cars have arrived from Canada which the writer has reason to believe have nearly all been sold. The chief objection to the Canadian butter, in the opinion of one importer, is that there is butter from so many different creameries in a car and so much variation in the quality of these products, that it is a little difficult to make a satisfactory price at point of shipment, taking a car of butter as a whole. Then again, it is held that Canadian butter varies too much in quality and often in the same shipment, some packages being better than the standard grade while others are inferior. This importer believes that there is a good opening for increased shipments of Canadian butter provided the price that can be realized here is in line with the Montreal market, but what Canadian butter he had seen this fall and handled, would not have a selling value of much more than 46 to 47 cents, out of which would have to be deducted freight, duty, cartage and commission for handling. He handled a car of butter on commission for a Montreal house recently, charging them 1 cent a pound for selling. They claimed to be disappointed in the price realized, but the importer could not do any better. Several importers have expressed the opinion that Canadian butter should be centralized here in one house, as it is felt that with proper advertising it would be but a short time before Canadian butter would be bringing as good a price as the finest butter manufactured in the United States.

When Canadian prices plus the duty can reach a parity with the prices prevailing here, shipments will be in greater demand. Canadian butter can be sold here like any other butter, but it does not usually bring the same high prices as the domestic. Canadian butter is generally packed in boxes, whereas the domestic butter is packed in tubs of 60 pounds net, which is the method of packing most preferred as the trade here is used to it. Some importers who purchase Canadian butter are constantly in negotiation with both Montreal and Toronto houses, but the apparently limited stocks of Canadian butter available for export prevent the transaction of a large volume of business at present.

POSSIBILITIES OF THE FUTURE

In spite of the shortage which exists, importers report no difficulty in buying all the butter necessary to supply demand in the trade, and one of the leading importers states that with the market at 54½ to 55½ cents and the foreign market so much lower, no difficulty whatever is experienced in meeting demands. One importer said that the make of domestic butter was commencing to show a slight increase, but that the market would have to decline 4 or 5 cents if the present rate of consumption were to be kept up. It would appear that there are some indications of a falling off in consumption due to the present prices, but it is likely that with the lowering of prices the consumption will tend to increase again. As a rule trade drops off during the Christmas holidays and continues into January, but a lower market is looked for in the near future. It is generally conceded that if Denmark stops shipping and United States domestic production does not increase, there will be a real shortage in February, March, and April. Present indications are that this shortage is generally anticipated. Importers therefore are averse to speculating at the prices now prevailing.

Most satisfactory prices have been secured on the New Zealand butter contracted for, and the writer is of the opinion that there is a definite opening at the present time for the still larger sale of Canadian butter in this market, and that any surplus of Canadian butter available may be disposed of to good advantage, provided a sufficiently thorough effort is made to secure the business by establishing early contacts and guaranteeing continuity of supply at competitive prices.

BUILDING CONSTRUCTION IN THE UNITED STATES

A. ST. JOHN BETTS, OFFICE OF THE TRADE COMMISSIONER IN THE UNITED STATES

New York City, January 4, 1923.—The total value of building construction projected in the United States for the year 1923 is estimated at $7,830,000,000, according to a survey just completed by the Copper and Brass Research Association. This amount includes buildings projected but not built during 1922 estimated at $2,480,000,000, but reduced by 50 per cent on account of overestimation and projects indefinitely postponed. In spite of the huge expenditure on building construction during the past year, when a little less than $5,000,000,000 was actually spent, there still exists a housing shortage of considerable proportions over the greater part of the country.

Of the total estimate of 1923, it is probable that, because of lack of financial, material and labour resources, $1,830,000,000 of the estimated $7,830,000,000 will have to be carried over into 1924. Of the balance, $1,180,000,000 will go for the building of schools, $960,000,000 for apartment houses, $720,000,000 for dwellings, and the balance for industrial and office buildings, hotels, etc. The Middle Western States will expend an amount estimated at $1,600,000,000, and New York State and the surrounding area $1,395,000,000.

No definite data is available as to how far the labour and material situation will enable the proposed building programme to be carried out, but careful consideration of the various factors involved places $6,000,000,000 as the possible amount of completion during the coming year. The maintenance of building construction activity during the closing months of last year was an important factor in stimulating business generally.

THE IMPORT TRADE OF CHILE

Trade Commissioner B. S. Webb

[Mr. B. S. Webb, Canadian Trade Commissioner in Buenos Aires, acting on instructions from the Department of Trade and Commerce, made last summer a special tour of investigation into Market Conditions and Possibilities in the Republic of Chile. His report is now almost completed; but meantime it is intended to publish that section of it which deals with the Import Trade of Chile in the *Commercial Intelligence Journal*. The completed report, which will include the section that is now being published serially, will later be issued as a pamphlet.]

I

The statement is frequently heard that there are practically only two classes in Chile—the very rich and the very poor—and the very poor are in an immense majority. The earning power, and consequently the purchasing power, of the labouring classes which form so large a part of the population is very limited, their wants being of the simplest kind. This condition is reflected in the import trade of the country, the larger part of the importation being made up of prime materials, construction and transportation material, industrial machinery and supplies, and essentials of life, the importation of luxuries and of certain domestic articles which are to be found in almost every Canadian home being on a comparatively small scale. The buying public for such articles as washing machines, electric irons, toasters, pianos, automobiles, etc., being limited, the Chilian market for these articles and similar commodities is considerably smaller than might be expected in a country of four million inhabitants. Railway material, iron and steel goods, wrought and cast iron piping, and heavy machinery and supplies for use in the mining and manufacturing industries, on the other hand, are imported to a very large extent. Importations during the past ten years have averaged $93,000,000 Canadian, the annual average for the three post-war years for which figures are available (1918-1920) having been $142,000,000. During the year 1920 importations were on an exceptionally large scale, the value of the commodities imported having reached $152,000,000; the figures mentioned in this section of the report relate to importation during this year and are approximate only, the Chilean gold dollar having been converted into Canadian currency at 33·3 cents instead of 36·5 cents, its proper par value. Textiles comprise one-quarter of the importation; iron and steel, industrial machinery, tools and accessories, and transportation material, 18 per cent; raw materials, 17 per cent; foodstuffs, drugs and chemicals, 12 per cent; and various manufactures, 12 per cent.

TEXTILES

Great Britain with exports amounting to $16,000,000 supplied nearly half the Republic's requirements in textiles. Importations from the United States were valued at $6,660,000 and those from France at $6,000,000. Germany and Spain supplied goods to the value of $1,000,000 only. Jute bags for shipping nitrate form the largest single item in the statistics, four million odd dollars' worth having been brought in from Calcutta. Piece goods come principally from Great Britain, imports from that country amounting to $11,000,000 as compared with $4,000,000 from the United States. Some $2,000,000 of silk and linen fabrics are obtained from France, importations from other countries being on a small scale. Knit goods, men's and women's underwear, socks, stockings, hats and garments are made locally to a large extent, but notwithstanding this,

these commodities were imported to the value of over $6,000,000. French manufacturers supplied one-third of the importations under these heads, those from the United States and Great Britain being valued at about $1,000,000. Some cheap cotton underwear is brought in from Japan. Sewing cotton to the value of $1,240,000 was imported from the United Kingdom. Cotton yarns were supplied by the United States and woollen yarns from Germany and Great Britain. Chile does not now provide a large market for cheap cotton knit underwear, socks, etc., as these articles are made locally with imported thread.

AGRICULTURAL MACHINERY AND IMPLEMENTS

Nearly the whole of the central part of the Republic is suitable for agriculture and the development of this industry is proceeding at a fairly rapid pace. Some 220,000 acres are under cultivation, but this area is capable of being increased to a considerable extent. Methods of husbandry in some districts are decidedly primitive and it is not an uncommon sight to see a man plowing with a yoke of oxen and two pointed sticks bolted to a heavy log which serves as plough-beam. Modern methods, however, are being adopted all over the country and importations of agricultural machinery are likely to increase in value. The following quantities of agricultural implements and machinery were imported during 1920: 2,516 tons of agricultural machinery, not specified; 1,292 tons ploughs and plough spares; 446 tons threshing machines; 415 tons shovels and spades; 119 tons reapers; 107 tons harrows; 81 tons picks, hoes and rakes; 81 tons dairy machinery; 74 tons implements, not specified; 67 tons pumps; 36 tons hay presses; 35 tons hay forks; 34 tons wool baling presses; 28 tons scythes and sickles; and 19 tons sowers.

United States manufacturers supply most of the demand for agricultural machinery, the bulk of the remainder being imported from Great Britain. A large Canadian manufacturer is selling implements here, but Canada does not appear in the statistics as an exporter, probably because shipments are made through New York. The values of the imports from the several countries during 1920 were as follows: United States, $920,000; Great Britain, $430,000; Germany, $180,000; Sweden, $40,000; total, $1,850,000. The business in agricultural machinery is almost entirely in the hands of the large merchant houses. Several of these own flour mills and are purchasers of the farmer's grain; others purchase his crops for export or act as consignees for him and make advances against growing crops. Under these circumstances agricultural machinery cannot be sold here by any one in competition with the merchant houses, and the only method of business open to a Canadian manufacturer is to induce a merchant house to take up and stock his line. As manual labour is exceptionally cheap in Chile, the agriculturist has not the same incentive to adopt labour-saving machinery as have farmers in other countries where labour is dearer, and it is only recently that steel ploughs have commenced to replace primitive native-beam ploughs. Tractors can never be used to a large extent in Chile, the land being too uneven to permit of their use. German agricultural machinery is now being sold at prices 20 per cent to 40 per cent below the cost of British and American machinery. It should be mentioned that in the six agricultural colleges in Chile, American-made machinery is being used almost exclusively.

Threshers.—Threshers were imported in 1920 to the value of $125,000, principally from the United States. The "Marshall" is prominent amongst English machines and the "Case" amongst the Americans.

Sowers.—A few sowers, valued at only $3,000, were imported from the United States.

Shovels and spades.—Shovels and spades came principally from England. They are usually sold without handles in 4½ lb. size. They are required prin-

cipally for use by contractors in railway construction and for the nitrate industry. Of the imports to the value of $176,000 during 1920, $130,000 is credited to Britain, $43,000 to the United States, and $3,000 to Germany.

Scythes and sickles.—Twenty-seven tons of these implements were imported during 1920, none of which were of United States origin. British manufacturers supplied 23 tons, German 3 tons, and French makers 1 ton. There is a strong preference for British-made sickles and one French implement, made by Messrs. Revollier and Coullaux, has a good reputation. German sickles are of decidedly inferior quality and are sold on price only.

Picks, hoes and rakes.—Of the $30,000 worth imported, Great Britain supplied two-thirds; imports from the United States were valued at only $5,000, and from Germany at $3,000.

Ploughs.—United States manufacturers supplied more than half the imports of ploughs, which were valued at $271,000 Canadian. Germany participated in this business to the extent of $79,000. Imports from the United Kingdom were negligible in quantity. Power tractors are not in general use in Chile, and the ploughs inspected were mostly single-furrow or two-furrow. Most of the well-known American ploughs are stocked in Chile.

Reapers.—The number of reapers imported was very small; the total importations were valued at $26,000. Shipments from the United Kingdom and Germany were valued at $7,000 and $2,000 respectively, the balance being of United States origin.

Hay forks.—With the exception of 3 tons imported from the United Kingdom and Sweden, American manufacturers supplied the total demand for forks, amounting during the year to 35 tons valued at $10,000.

IRON AND STEEL PRODUCTS

The trade in iron and steel products is almost equally divided between United States and British manufacturers, who supplied products to the value of $6,000,000 and $5,330,000 respectively. Imports from Germany were valued at $1,230,000 and from Belgium at $580,000. Under this heading are included pipes and fittings, galvanized iron sheets, merchant bars, iron and steel wire, iron and steel black plates, pig-iron, galvanized iron, and steel wire. Total importations of these commodities during 1920 amounted to $14,000,000. The United States Steel Products Company carry stocks in Chile and formerly used to confine their operations to supplying the half-dozen large merchant houses handling iron and steel products. It is reported that they are not now so particular as to who they supply, and smaller people can secure supplies from them against payment of spot cash. Presumably the larger houses are able to purchase on better terms than the smaller people, but the idea appears to exist amongst them that the corporation is selling to their customers.

Pipes and fittings, black and galvanized, were imported to the value of $1,840,000. Of this quantity nearly one-half came from the United Kingdom, and the balance from Belgium and the United States in about equal proportions. Imports from Germany were valued at only $200,000. One English firm does a large business through local representatives, whilst the United States Products Company and the Mannesmann Tube Company operate branches here with stocks for supplying the trade. Pipings and fittings are used to a large extent in the nitrate plants and in the copper mines. The state railways are large consumers, and certain quantities are used in connection with irrigation works and water supply.

Iron sheets, galvanized.—These are imported in fairly large quantities, 7,495 tons having been imported during 1920. English sheets are preferred in

Chile, and the bulk of the imports (5,446 tons) came from Great Britain. The United States Steel Products Company distribute through merchant houses and also carry stocks. Sheets are imported in 6-foot and 10-foot lengths, 30 inches wide, gauge 24, with ten 3-inch corrugations. They arrive packed in strapped cases with felt packings between each sheet. As there are a number of galvanizing establishments now operating, it is expected that more iron sheets will be imported plain and ungalvanized and less galvanized than formerly. Imports from the United States during 1920 amounted to 2,048 tons, and from Great Britain 5,447 tons.

Merchant bars.—The Chilian market absorbs large quantities of iron and steel merchant bars. The demand for this commodity is now being met by United States exporters, but formerly Belgian and German manufacturers supplied the market with the bulk of its requirements. Merchant bars are imported for general construction purposes, rounds for concrete work and flats for foundry work and tires. A quality known as No. 3 Belgian was the standard for the market. Stocks are kept locally by the United States Steel Products Company and some half-dozen English merchant houses. English prices were about £1 per ton higher than American prices and most of the business is still going to the States. Imports during 1920 amounted to 13.224 tons, 9,626 of which came from the United States and 3,166 from Great Britain. Imports from Germany and Belgium were negligible in quantity.

Wire, iron and steel.—This is one of the largest items of importation amongst iron and steel products, totalling 7,395 tons during the year. Plain and galvanized wire is imported for fencing, sizes No. 6 and 8; gauges 12 and 14 are used for baling hay, these sizes being the largest sellers. Barb wire is not imported on a very large scale, Belgian and German manufacturers predominating in this trade. Nail wire was formerly imported from Belgium, Germany, and England, but German manufacturers cannot guarantee deliveries. The trade in nail wire is controlled to a certain extent by one English importing house which owns a nail factory in Santiago and has a large financial interest in other nail factories in the Republic. Although a certain amount of wire is stocked in Chile, most of the business is done on the basis of direct importation on cable c.i.f. quotations. With the exception of plain wires local stocks at the present moment are almost exhausted. Importation during 1920 was as follows: United States, 5,300 tons; United Kingdom, 1,473; Belgium, 131; Holland, 124; Argentine Republic, 149; Germany, 186; and France, 29 tons.

Iron and steel plates; plain, not galvanized.—There is a fairly heavy demand for these plates, which is at present being supplied by United States exporters. They are used to a large extent in the construction of evaporating tanks in nitrate plants, and the United States Steel Products Co. import a quality called "tank quality plates" in the thicknesses ranging from $\frac{1}{8}$ inch to $\frac{3}{8}$ inch, in sizes 6 feet by 3 feet, 6 feet by 4 feet, and 8 feet by 4 feet; these are sold almost entirely from local stocks, conditions in this respect being the same as for other iron and steel products. Of the 4.892 tons imported during the year, United States manufacturers supplied 3.840 tons, British manufacturers 967 tons, whilst 84 tons came from Germany and Sweden.

Pig-iron.—Pig-iron was imported by half-a-dozen foundries operating in the Republic to the extent of 6.559 tons, of which 4,745 came from the United States, 977 from the United Kingdom, and 737 from France. No. 2 soft is the grade in demand, stocks of which are carried by the United States Steel Products Company and merchant houses.

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Iron and steel plain galvanized sheets are imported for guttering and general contract work in gauges ranging from No. 30. English sheets are preferred, but larger quantities of American sheets are being sold due to the fact that they can be supplied from local stocks. Importation from the United States amounted to 480 tons, and from the United Kingdom 383 tons—a total of 863 tons for the year.

GREAT BRITAIN AS A MARKET FOR RUBBER GOODS

Trade Commissioner Harrison Watson

London, December 22, 1922.—The United Kingdom is an important manufacturer of rubber products, and the scope includes almost all varieties. Statistics relating to production have always been scanty in comparison with certain other countries, and war conditions held up action which was being taken to remedy this position, but it is understood that nearly two-thirds of the crude rubber which is consumed annually in this country is absorbed by the tire industry; some 15 per cent in the manufacture of waterproof apparel, which has always been an important British industry; and most of the balance in footwear and mechanical rubber goods. All the same there is a large importation of most classes of rubber goods (notably of pneumatic tires), the grand total of which was valued in 1920 at £7,108,683 and in 1921 at £4,926,474.

As during the war, when practically all European factories were concentrated on war equipment, and subsequently, most of the important Canadian manufacturers thoroughly investigated the prospects in this country in tires, footwear and rubber products generally, and several of them established a branch or alternative selling arrangements, the principal features of the trade must be pretty generally known in Canada. Consequently, the present report is mainly confined to an outline of conditions, in arriving at which the writer has, moreover, had the advantage of the advice of authorities who have been acting for Canadian interests.

In the case of most commodities where Great Britain offers an open market, active competition prevails, and it is certain that there are few branches of trade in which competition is fiercer than in rubber goods, so participation by the overseas manufacturer, at least as regards automobile tires, is only possible through the medium of a branch carrying large stocks, supplemented by a thorough and expensive organization and advertising propaganda. Branch assistance would also be helpful in most other lines, but failing this an active individual resident agent is an essential factor, except possibly as regards specialties or novelties which are capable of being handled by dealers.

The present, it is feared, is a specially unpropitious time for the Canadian manufacturer, because a period of trade depression and exchange difficulties has been supplemented by a fierce fight between the two biggest manufacturers of tires, the Dunlop Company and the Michelin Company, which is disorganizing the trade, and a struggle of almost equal violence is being waged in another important branch, the canvas shoe trade, between the British makers and a leading United States manufacturer.

CUSTOMS DUTY

There is no customs duty on manufactures of rubber when imported into the United Kingdom, and in respect to the duty of 33⅓ per cent levied on motor cars, motor bicycles, motor tricycles, and component parts, it is specifically stated that tires are exempt from such duty. Upon the other hand, as accessories and component parts of motor vehicles used for pleasure are also liable

to the duty of 33⅓ per cent, it would appear that any rubber goods falling under this category would be dutiable. Such articles manufactured in Canada would only pay two-thirds of the full rate in any case.

STATISTICS OF IMPORTS OF RUBBER COMMODITIES

Before proceeding to a consideration of some of the chief features of the different sections of the trade, it is advantageous to reproduce the official statistics of imports of rubber products into the United Kingdom during the calendar years 1920 and 1921, according to the classification adopted by the British Government. In this connection it is desired to recognize the courtesy of the customs officials in furnishing this office with the 1921 figures before their actual publication. It should also be added that in cases where imports from "British Possessions" are grouped together, it may be assumed that the bulk of the receipts are of Canadian origin.

IMPORTS INTO THE UNITED KINGDOM OF RUBBER MANUFACTURES

	Quantity		Value	
	1920	1921	1920	1921
Rubber Tires and Tubes—	No.	No.	£	£
Motor Car Outer Covers.				
Total	947,103	784,882	4,656,450	3,457,200
Principal sources:				
United States	348,346	218,555	1,868,507	871,271
France	265,056	354,355	1,105,970	1,659,159
Canada	191,850	64,969	1,062,516	271,205
Italy	121,637	116,627	482,388	530,352
Belgium	10,215	12,927	62,640	59,724
Germany	6,193	2,690	51,631	11,513
Motor Cycle Outer Covers.				
Total	27,712	35,112	67,674	91,649
Principal sources:				
Belgium	12,045	23,615	33,990	70,197
United States	10,027	4,574	22,987	10,585
France	5,275	4,456	9,945	7,487
British Possessions	87	1,147	217	2,127
Cycle Outer Covers.				
Total	222,120	141,547	56,204	29,765
Principal sources:				
Japan	114,118	44,668	21,116	8,355
France	54,044	29,426	17,611	7,672
United States	43,462	4	10,836	8
Canada	......	4,575	......	2,013
Germany	520	50,209	187	8,838
Inner Tubes (all kinds).				
Total	1,020,294	555,005	650,432	301,454
Principal sources:				
France	325,151	248,044	195,895	144,961
United States	289,138	123,483	273,523	96,343
Canada	99,623	48,629	128,901	35,430
Japan	257,537	1,310	22,297	322
Italy	19,643	19,858	15,832	13,378
Solid Tires.				
Total	23,354	37,122	146,301	206,010
Principal sources:				
United States	9,638	5,507	66,464	37,152
France	4,678	10,074	33,143	66,028
Germany	1,805	7,344	7,452	29,747
Rubber Footwear—				
Boots and Shoes.				
	Doz. pairs		Doz. pairs	
Total	280,481	62,600	714,685	158,985
Principal sources:				
United States	187,105	19,506	522,477	61,913
Canada	80,170	17,083	161,916	42,972
France	6,737	12,059	19,378	30,895
Germany	2,488	11,888	3,611	18,489

IMPORTS INTO THE UNITED KINGDOM OF RUBBER MANUFACTURES—*Concluded.*

	Quantity		Value	
	1920	1921	1920	1921
	Tons	Tons	£	£
Rubber Footwear (Continued).				
Rubber Heels and Soles.				
Total	117	31	34,888	8,886
Principal sources:				
United States	67	19	20,091	5,224
British Possessions	47	8	13,930	2,535
Piping and Tubing of Rubber—				
Total	637	261	161,345	63,908
Principal sources:				
United States	613	253	154,145	61,300
British Possessions	19	......	4,499	218
Rubber in Sheets, Threads, Etc.				
Total	276	186	144,936	120,695
Principal sources:				
United States	166	162	112,807	116,549
British Possessions	5	2	1,193	473
Rubber Balls (Golf, Tennis and Other)—				
Total	Value only		2,115	85,824
Principal sources:				
Germany			976	19,173
Austria and Hungary			20	51,421
British Possessions			28	185
Rubber Toys—				
Total	Value only		76,461	54,064
Principal sources:				
Japan			47,443	24,701
United States			10,511	119
Austria and Hungary			8,036	1,934
France			5,945	14,041
Apparel: Overcoats, Mackintoshes, Oilskins and the Like—Rubber-Proofed—				
	No.	No.	£	£
Total	3,441	5,143	6,130	6,737
Principal sources:				
France	1,108	2,012	1,770	1,839
Sweden	803	229	1,099	216
United States	792	67	2,008	210
Netherlands	162	1,619	191	2,944
Rubber Manufactures, Not Elsewhere Specified, Including Rubber Gloves—				
Total	Value only		391,062	341,297
Principal sources:				
United States			283,560	236,836
France			38,044	40,913
Germany			16,102	37,387
Japan			14,286	541
Belgium			10,341	3,090
Italy			10,284	3,939
Canada			8,740	3,222
Grand Total of Rubber Goods			7,108,683	4,926,474

As regards the present year, according to unrevised general figures which are issued monthly by the Board of Trade, the following were the quantities and values of the imports of rubber manufactures for the eleven months ended November 30, 1922. It will be noticed that they show a decided increase over 1921:—

	Eleven Months ended November, 1922 Quantity	Value
	No.	£
Rubber tires and tubes	3,136,276	4,021,437
	Doz. pairs	
Rubber boots and shoes	104,275	213,859
Other sorts	Value only	867,813
		£5,103,109

Rubber Tires

(1) AUTOMOBILE OUTER COVERS

As will be seen, the importation of tires of various kinds outdistances that of all other varieties of rubber goods combined.

Although British-made tires have always been originally fitted to most of the cars made in the United Kingdom, there has, almost from the inception of the industry, been a heavy importation of foreign tires for replacement purposes.

Before the war, the Dunlop and Michelin companies were the principal competitors, another important rival being the German-made "Continental" tire, where several of the American and other European brands also controlled a certain amount of business.

During the war, when the output of European factories was almost wholly diverted to military requirements, the United States manufacturers increased their foothold pretty considerably, and among those which achieved popularity was a Canadian-made tire, the "Dominion," although it is now controlled and sold in this country by United States interests.

Since the armistice, the Michelin has, however, reassumed its ascendancy and stands by itself, it being estimated that the Michelin Company at present controls some 60 per cent of the total replacement trade of the United Kingdom, 30 per cent of which is shared almost equally by British and United States makers. It is repeated that British tire manufacturers have contracts with British car makers which still enable them to supply nearly all original tires.

It is somewhat difficult to estimate the annual consumption of tires in the United Kingdom, but according to figures just issued by the Ministry of Transport, the total number of licenses for motor-propelled vehicles issued in the year 1921 was 873,665. This of course includes every variety, both pleasure and commercial, but it is estimated that there are somewhere about 300,000 pleasure motor cars in use, and at the low estimate of four tires a year, this would represent a consumption of somewhere about 1,200,000.

The tire in chief demand has been the beaded edge of metric dimensions, which authorities estimate is used to the extent of 80 per cent, in comparison with 20 per cent for the straight side tire. This preference has been a handicap to many of the United States and Canadian manufacturers of tires, whose output is chiefly the straight side tire.

A more recent development is the popularity of the new cord tire, which has so affected the demand for the old fabric variety that some go even so far as to predict that it will supersede the latter altogether in the course of a year or two. This feature is also detrimental to many transatlantic makers, most of whom have been backward in adopting the cord variety.

There is a probability, however, that the position will be materially altered by the vigorous advertising campaign which the Dunlop Company has now inaugurated in favour of the straight side cord tire, so that the progress of events should be followed.

A further consideration which has added to the difficulties of outside manufacturers who do not maintain distributing depots in the United Kingdom is the licensing system in vogue, which by adopting as the unit a tax of £1 per registered horse-power, has been responsible for the creation of an infinite variety of light, and in many cases freak cars, which require a great diversity of tire sizes, in contrast to the adoption in the United States and Canada, and to a considerable degree elsewhere, of the standardized mass-production car by persons possessing slender purses.

While on this subject it seems useful to mention that the 815 by 105 and the 820 by 120 mm. are the sizes most in demand in this country, with 710 by 90 mm. and 760 by 90 mm. for light cars. The 765 by 105 mm. is also popular. The chief straight side tire is the 32-inch by 4½-inch, followed by the 32-inch by 3½-inch and 33-inch by 4-inch.

METHODS OF DOING BUSINESS

The circumstances already narrated show the necessity of branch organization, and the urgency of this is still further emphasized by the almost universal practice whereby the bulk of tires distributed in Great Britain are consigned to dealers upon the "sale or return" system. This practically means the extension of organization to every possible channel of sale, including every village public garage.

FUTURE PROSPECTS

As regards the future, it is difficult to make any forecast. Although the use of the automobile has been retarded by unfavourable financial and trade conditions which have prevailed for some time past, and the present system of licensing is another deterrent, it is certain that the automobile habit is increasing, if at a lesser rate than across the Atlantic. For this reason the consumption of tires will steadily increase, and will be accelerated by the return of prosperous times.

The Dunlop Company manufacture upon a scale which outranges any of the other British manufacturers, because they specialize, whereas in most other cases a variety of other products is turned out besides tires, and the fact of the United Kingdom being a free market has discouraged development.

As regards the Dunlop Company, however, this is one of the biggest of the world's tire enterprises, and although they have passed through very bad times, it is to be anticipated that the activity and enterprise of the new management will speedily effect improvements regarding quality and general organization which will obliterate the past, and their present attitude indicates that the company intend to leave no stone unturned to achieve this end. Like all British companies, they have suffered from the dumping of foreign-made tires upon a free market, and although there is no indication that the import duty for which all British makers have been agitating is likely to be granted, the restoration of manufacturing facilities and the steady fall in wages which is taking place should greatly help British tire manufacturers in their effort to hold the trade in this country. The fact that hostile tariffs now practically close many European markets makes the retention of the home market of vital importance.

Prices have already fallen substantially from the war levels, and are still declining. The chairman of the Dunlop Company, in the course of the annual meeting just held, stated that further reductions which are coming into force will reduce selling prices of tires to little above the pre-war level.

It is known that very large quantities of American tires of all sizes and qualities were thrown on to this market within the past year or so, and that large stocks of these are still unsold, which combined with the drop in prices, has caused disastrous results to the shippers. Indeed, the present position in the rubber products trade all round is an unfavourable and disappointing one.

While for these reasons the outlook for Canadian tires is uncertain, it seems pretty clear from the experience of the Michelin Company that there will always be a good opening for a high-class tire, provided that quality is rigidly maintained and an enlightened policy and selling organization adopted. At the same time it should be repeated that satisfactory results can only be obtained by the establishment of a resident organization, backed up by clever advertising, and there is little hope for the manufacturer who plans to capture the trade through a manufacturer's agent or similar channel.

(2) MOTOR CYCLE OUTER COVERS

Another result of the system of taxation by horse-power has been the substitution of the motor cycle and side car for purposes which, across the Atlantic, are filled by the cheaper grade of automobile, and in 1921 no less than 355,000 motor cycles, many of them fitted with sidecars, were registered by the Ministry of Transport.

Up to the present, however, the supplying of motor cycle tires has been almost monopolized by United Kingdom manufacturers, and consequently imports have been comparatively small. There seems no sign of any alteration in the source of supply, so it suffices to state that the demand is mainly confined to 26-inch by $2\frac{1}{2}$-inch and 26-inch by $2\frac{1}{4}$-inch sizes.

(3) BICYCLE OUTER COVERS

The bicycle appears to maintain its restored popularity, and it is said that there are between 1,250,000 and 1,500,000 in use. Practically all these bicycles are manufactured in Great Britain, and the tires are also British-made. About 90 per cent of the tires are of the wired-on type, and the most common size is the 28-inch by $1\frac{1}{2}$-inch.

(4) INNER TUBES OF ALL KINDS

Although inner tubes are imported to a considerable extent for replacement purposes, the demand, as far as automobiles and motor cycles are concerned, is almost exclusively for the red tube, and there is little sale for the grey variety, which is extensively used in the United States. Bicycle inner tubes, on the other hand, are nearly always grey in colour.

(5) SOLID TIRES

In contrast to the pleasure vehicle trade, the solid tires used in this country are mainly home-manufactured. Previous to the war, the German "Continental" Company participated very largely in this business, and now that they have recommenced operations, it seems likely that a determined effort will be made to retrieve the position which they lost during the war. At the moment, however, this trade is mainly held by the Dunlop and Macintosh tires, the quality of both of which is highly regarded.

The range of sizes in use and the peculiar requirements of the country have rendered competition from across the Atlantic difficult, owing to the necessity of manufacturing specially for this market. Moreover, prices have been demoralized, resulting from the indiscriminate selling of huge stocks of war surpluses.

It is worthy of note that solid tires are used here in the cases of many vehicles which in America would be fitted with large pneumatic tires, a condition partly due to the better surface of the roads. Still there is some use of pneumatics, although it probably does not exceed 15 to 20 per cent. In such instances, however, there is a very general custom of preferring two ordinary pneumatic tires on each rear wheel to the single tire of larger dimensions used in the United States.

Rubber Footwear

(1) CANVAS RUBBER SHOES

The out-standing demand in footwear is for the canvas rubber-soled shoe for sports purposes, and mainly for the light and cheap variety known in this country as the "Plimsoll." The production of these is an important British industry, and while considerable quantities have always been imported, exports of British-made shoes have generally exceeded the imports.

It will be known that during and after the war Canada worked up a considerable trade in rubber shoes in the United Kingdom, and as this consisted largely of specialties, it was anticipated that a good proportion of the business could be retained.

The gradual decline in prices, combined with a falling off in demand, and supplemented by the price-cutting fight previously referred to, has, however, disappointed these hopes, at least temporarily. As rubber shoes generally form a line in which the British manufacturer is well equipped for meeting competition, it is uncertain to what extent trade in the imported article may again become profitable, but in any case opportunities are likely to be confined to the higher grades of rubber-soled shoes. Incidentally, this necessitates the manufacture of the special shapes required in this country.

(2) RUBBERS AND OVERSHOES

Another direction in which Canadian prospects for participation were considered good was in rubber overshoes and similar footwear.

During the war, the Dominion supplied large consignments of hipboots and other footwear, and it was confidently anticipated that the practical proof of the protective value of the rubber footwear experienced by the troops in France and Flanders would result in a heavy and permanent increase in its use among civilians. This hope, however, has so far failed to materialize, because every winter since the war has been practically snowless as far as England is concerned, and it is understood that heavy stocks accumulated to meet the expected demand are mostly quietly perishing. For some reason, the man in the street has never taken kindly to overshoes, there being an idea that they are cumbersome and insanitary.

(3) RUBBER HEELS AND SOLES

Upon the other hand, among the general public, there has been a general increase in the use of the rubber heel and sole, which is almost exclusively a British product. This is probably due to the fact that the chief enemy in this climate is the damp and not the snow, apart from the greater cheapness and durability of the rubber sole and heel.

Mechanical Rubber Goods

This designation covers a considerable variety of rubber products, and as no separate United Kingdom import returns are kept, except in the case of tubing, it is difficult to arrive at any idea of the quantity or value of particular items. As those most in demand are manufactured in the country to a considerable degree, it is to be judged that outside contributions in many cases are small.

For instance, the use of garden hose alone is so general than the quantity of rubber piping of all kinds in use must attain a big total, of which imports, which are chiefly supplied by the United States, can only be a small proportion. In view, moreover, of the variety of kinds and sizes in demand, outside manufacturers would have to carry stocks in this country.

Rubber belting is much less used in the United Kingdom than in the United States, and attempts to supplant leather and balata have so far achieved little. As matters stand, United Kingdom manufacturers can advantageously supply any that is required.

Home producers also hold a strong position in the provision of the numerous kinds of rubber packing which are used in the engineering trades.

Rubber Apparel

As regards apparel, which, it has already been stated, forms a considerable proportion of Great Britain's rubber industrial output, it suffices to state that waterproof clothing is a line in which British manufacturers have always stood supreme, and in which moreover they do a large export trade, and under these circumstances imports of foreign-made goods, as might be anticipated, are absolutely insignificant.

Miscellaneous Rubber Manufactures

While the use of domestic and sanitary rubber goods is much less general than across the Atlantic, their popularity is spreading, and it is probably in this direction, and in specialties, that the most favourable opportunities for Canadian manufacturers exist, more especially as business in such lines can be secured at much less outlay.

Rubber gloves, for instance, is a line which is so far chiefly imported, and although competition from the United States and elsewhere is keen, certain quantities of Canadian rubber gloves have been marketed here. It will also be observed that a fair value of rubber toys is imported.

While the production is understood to be increasing in this country, a large proportion of the surgical rubber goods used are known to be of outside production, France and the United States being important contributors.

A commodity, the use of which has increased enormously in recent years, is the rubber hot-water bottle, which has now in the case of many people become an indispensable companion and is gradually superseding the earthenware foot-warmer. At one time these rubber bottles were mainly of foreign make, but the manufacture of hot-water bottles of the most satisfactory quality is now being conducted in Great Britain upon a very considerable scale.

GENERAL CONCLUSIONS

The enormous increase in the world's production of rubber and its consequent cheapness is certain to be followed by a marked extension of the use of rubber goods, in which the United Kingdom is bound to participate, more especially because it is so heavily financially identified with the raw rubber industry and consequently interested in increasing the use of the crude material.

At the same time there is already an important domestic production in most varieties of rubber manufactures, and home manufacturers will be keenly alive to the development of any opportunities which occur.

For this reason, and others referred to in the foregoing report, competition is sure to remain extremely active, and any Canadian manufacturer who sets his eyes on the large consuming capacity of a population such as these islands contain must be prepared to adopt the perfected organization which successful rivals have found indispensable, and moreover be prepared to find that the organization, combined with missionary work and propaganda, will be a somewhat expensive item.

DEMAND FOR BONES IN GERMANY

TRADE COMMISSIONER L. D. WILGRESS

Hamburg, December 20, 1922.—During the last few weeks a keen demand has arisen in Hamburg for bones. This demand has originated with the manufacturers of tooth-brushes, buttons, etc., who are reported to have been buying freely from the dealers, the latter obtaining their supplies from brokers and agents in Hamburg. The bones in chief demand are flat and round shank bones. Flat shank bones, weight 50 pounds or more per 100 pieces, can be sold for about $93 a ton, ex free port Hamburg, while round shank bones, weight 58 to 60 pounds per 100 pieces, fetch from $148 to $162 a ton according to quality. Side bones bring about the same prices as round bones, but are not sold in as large quantities, while other bones such as thighs, blades, cannons, etc., are not in very great demand.

Bones are mostly shipped to Hamburg on consignment, shipments of around 200 tons being quite frequent. The large exporters from North and South America usually have agents in Hamburg, who advise regarding the sending of consignments. The goods are often sold, however, to the dealers by brokers, who receive the customary commission of one or two per cent. Sales are usually effected in carload lots of 5 or 10 tons. The goods are sold ex free port, Hamburg; gross for net, delivered weight; payment by first-class bank cheque on London against delivery. The buyer has therefore to arrange for the import license and all details regarding shipment into the interior.

Large shippers, such as certain of the leading packing companies whose brands have become well known, can sell for shipment, cash against documents on arrival Hamburg, but this can only be done when confidence has been established and the buyers know that the goods will be up to " fair average quality " as ordered. New shippers can only do business on a consignment basis, the goods being shipped to the free port, consigned to agents or entrusted to a bank, sales being arranged through Hamburg brokers.

Bones are shipped to Hamburg chiefly from Monte Video, the Argentine, and the United States. Few direct shipments have been received from Canada, but brokers state that Canadian bones are being received in Hamburg through English houses. Unbleached bones without the knuckles off, being practically in the condition in which they left the slaughter-house, are imported from Havana and sold for low prices. From Canada only cut and bleached bones could be imported, and care would have to be taken that the bones fulfil the trade requirements as regards weight and absence of yellow spots. The knuckles are imported separately for glue-making. Bones are usually shipped from North America packed in sacks.

IMPLEMENTS IN DEMAND IN THE KENYA COLONY

The market for farm implements in Kenya Colony, British East Africa, is becoming increasingly important, as is evidenced by the fact that the number of implements used in the colony increased approximately 25 per cent in 1921, as compared with 1920. The actual number of implements in the colony is not yet large, and there is opportunity for a considerable increase. At the end of 1921 there were in Kenya 800 ploughs, 1,770 harrows, 2,600 cultivators, 450 drills and seeders, 165 harvesting machines, 63 threshers, 400 corn shellers, 200 gas engines, 131 tractors, and a variety of farm vehicles and dairy appliances.

TRADE AND FINANCIAL CONDITIONS IN AUSTRALIA

Mr. D. H. Ross, Canadian Trade Commissioner, Melbourne, sends the following cable descriptive of business and financial conditions in Australia:—

Trade conditions throughout Australia in 1922 were much more normal than in the preceding two years, the importing boom of 1921 having caused abnormal value of importations for that period. During 1921-22 importations dropped by over 60 millions sterling in comparison with previous year, but latterly importations are showing substantial increases, which are reflected in customs revenue for six months ended December 30, which was £16,459,000—an increase of nearly £3,400,000 on previous similar period. The feature of last year's trading has been the rather unexpected realization of accumulated wool stocks in England and the high prices ruling at wool sales in the Commonwealth. Commonwealth and State Governments have sent expert delegation to England to assist by organized propaganda in extending the markets for canned and dried fruits. It is probable delegation will visit Canada on return journey, particularly in the interests of the export trade in Australian currants and raisins. Despite appeals to Arbitration Court and renewed conferences with unions, prospects unfavourable for early resumption of Newcastle Steel Plant, although some subsidiary industries are reopening with full supplies of imported raw materials. After generous December rainfall, climatic conditions generally excellent, and hopes are entertained for remunerative prices for meat exports. Domestic flour mills fully engaged with exports chiefly to Egypt, otherwise wheat and flour trade without animation. Financial position strong with abnormal accumulations of Australian funds in London. Trading outlook for 1923 quite up to normal.

COMMERCIAL NOTES FROM NEW SOUTH WALES

Commercial Agent B. Millin

Trade Conditions in New South Wales

Sydney November 23, 1922.—Although the near approach of the usual Christmas trade has given some impetus to business, generally speaking it may be said that trade is very dull.

Various causes have contributed to this unsatisfactory condition, the chief of which is no doubt the near approach of the elections for the Commonwealth Parliament. The shipping trade of Australia is in a very depressed state, and at no port is it more noticeable than at Sydney where a large number of steamers are laid up. The laying up of these steamers at that port is not, however, due to any special dulness in trade at Sydney over that of other Australian ports, but rather to its central position, safe and convenient anchorages, and other facilities. Shipping authorities freely assert that the tonnage laid up at present exceeds that of any previous period.

Drought conditions continue to prevail throughout the state and are seriously cramping trade.

Shale Oil Production in New South Wales

Oil-bearing shale of a very high quality is found in a number of localities in the State of New South Wales. The shale occurs in the same manner as seam coal, but the deposits are confined to smaller areas, the seams varying in thickness from a few inches to 6 feet. Frequently the upper and lower

portions of the seams are composed of bituminous coal, the kerosene shale being confined to the central band. The shale is really torbanite or cannel coal, similar to the boghead mineral of Scotland, but yielding a much higher percentage of volatile hydro-carbon. The richest shale yet discovered yields about 130 gallons of crude oil per ton, or about 15,400 cubic feet of gas.

The shale is suitable for mixing with ordinary coal in the manufacture of gas, and considerable quantities are exported overseas and to the adjoining states for that purpose. For many years oil has been extracted by several large works operating in this state, but the high cost of labour has made its production almost prohibitive when compared with the cost of oil imported from abroad.

Recognizing the importance of the locally produced material, the Commonwealth Government in 1917 passed an act for the payment of a bounty on shale oil produced in Australia. This act expired recently, and a fresh act was passed by Parliament extending the system for another year, and at the same time, increasing the Government payment from $2\frac{1}{4}$ pence to $3\frac{1}{2}$ pence per gallon. It is estimated that the whole cost of the bounty for the year will amount to £74,000.

Import and Export of Timber, New South Wales

The total value of timber imported for the year ended June 30 last was £1,478,171, included in which was 110,224,800 super feet of rough dressed and undressed (mainly softwood timber), valued at £1,457,521. The value of timber exported was £354,857, included in which was 20,398,200 super feet of undressed, dressed, and log timber (mainly hardwood), valued at £354,894. The bulk of the timber exported consisted of piles suitable for wharfage purposes. These piles are cut from the species known as the turpentine tree (*Syncarpia laurifolia*), the timber being of a dark undecided brown colour, tough, hard, and close grained, and in texture and grain not unlike Ironbark, one of the hardest and most durable woods grown in Australia. Specially used for piles, it is able to resist the attack of the marine teredo and is generally driven with the bark on, the inner layer containing a resin not relished by animal life. Instances are known where the piles have lasted in salt water for a period of fifty years undamaged.

Softwood Imports into New South Wales

The imports of softwoods into New South Wales, amounting as they do to the value of £1,478,000, prove conclusively that the supply of naturally grown softwoods is a small one, and nothing but a vigorous policy of afforestation will enable future needs to be supplied. So far very little has been done in this direction, and it can be safely premised that the imports of softwoods will not decrease for many years, but on the other hand, with increasing population and the consequent greater demand, are more likely to increase. Soil conditions are, however, suited for the growth of high-class softwood timber.

Paper-making Tests in Australia

Tests are being carried out by the Australian Bureau of Science and Industry in order to ascertain the suitability of Australian timbers and pulp for paper-making. Samples of printing paper made from Karri mill waste pulp (70 per cent) and imported sulphate pulp (30 per cent) have recently been the subject of careful investigation. These samples, it is stated, show that a printing paper suitable for many purposes may be made from a mixture of the pulps referred to. Some difficulty was experienced in getting the pulp to run on the machine, but, in the opinion of those in charge of operations, a

suitable paper may be made by modifying the preliminary treatment, and this view is to be tested by further experiments. Similar experiments are to be carried out using a number of other timbers, and an estimate made of the probable cost of production of the pulp and its paper-making value.

Export of Ratoon Cotton Prohibited

The Queensland Government has definitely decided to prohibit the export of ratoon cotton (or cotton obtained from plants more than one year old), so far as its export to England is concerned. This action has been taken in view of the very emphatic advice tendered by the British Cotton Delegation on the subject. It has therefore been decided that the guarantee price of 5½ pence per pound for seed cotton of good quality (guaranteed conjointly by the Commonwealth and Queensland Governments up to 1924), shall not be paid for ratoon cotton. Ratoon cotton will only be accepted at the ginneries at the growers' risk and will be paid for at the price based on realization.

Stock in New South Wales

According to the latest returns issued by the Stock Department of the State, there were 34,776,075 sheep in New South Wales on June 30 last, an increase of 3,879,000 over that for the year ended June 30, 1921. The cast of sheep for the coming year is estimated at 9,200,000. Horses number 525,431, a decrease of 7,363, and cattle increased to 3,250,000, an increase of 258,939.

Season's Record Price for Wool, New South Wales

Competition for high-class wools is still very animated, and a record price for the season of 38½ pence per pound was established last week, being a rise of 5¼ pence per pound on the previous record for this season. The wool in question was, however, of a very fine quality, soft handle, and light and free.

Cotton Mills for Sydney

It has been announced that a company which has been established at Sydney for some years and uses from £200,000 to £250,000 worth of imported cotton yarn a year, has decided to erect cotton mills in that city with a plant of 15,000 spindles. It is estimated that raw cotton to the value of £800,000 will be used per annum, much of which, it is hoped, will be Australian grown.

TRADE OF FIJI

There was a decrease in the value of the total trade of Fiji during 1921 when compared with that of the previous year. Imports declined from £1,673,121 to £1,509,732, while exports decreased from £2,896,448 to £2,541,458, the value of the total trade thus falling from £4,569,569 to £4,051,190. The principal items of export continued to be sugar, copra, and bananas. Seventy-eight per cent of the total trade of the colony during 1921 was with British Possessions, chiefly Australia, Canada, and New Zealand. Only 8·6 per cent of the total trade was with foreign countries, chiefly the United States. The total trade of the colony with the United Kingdom increased from 5·78 per cent in 1920 to 13·19 per cent in 1921; that with British Possessions increased from 77·19 per cent to 78 per cent; and that with foreign countries fell from 16·68 per cent to 8·60 per cent in 1921. The falling-off in trade with foreign countries is accounted for by the fact that more than half the copra exported from Fiji went to the United Kingdom.

TRADE CONDITIONS IN BRITISH MALAYA AND THE NETHERLANDS EAST INDIES

Trade Commissioner P. W. Ward

Singapore, November 24, 1922.—The monthly returns of imports and exports for British Malaya for October show an increase in exports to the value of $10,296,673, while a decrease in imports of $697,610 is recorded.

Rubber shipments show an increase from 453,199 centals to over 600,000 centals, the difference in value in these quantities being represented by $6,212,398. Tin exports also show an increase, from 86,222 pikuls (1 pikul= 133⅓ lbs.) to 99,845 pikuls, the value being correspondingly high. Preserved pineapple shipments, owing to the close of the season for the last crop, have again fallen and are the lowest on record for this year, the value of the exports for the month in question being $105,128; as compared with the highest record for the present year, the month of May, there is a drop of $1,386,717.

Canada bought fair quantities of rubber, preserved pineapples, tapioca, peppers and rattans.

The imports into British Malaya for the month of October, as compared with the same period of the preceding year, show a decrease of $2,981,879 on the total value. Declines are recorded on items connected with food and drink and on manufactured goods, but an increase on raw materials is shown.

Siam

The economic situation is still improving in Siam. During October imports totalled only 9,431,057 ticals (1 tical = 2s. 1d.), a decrease of 123,128 ticals as compared with the previous month, while the exports exceeded those of September by 2,962,051 ticals.

Rice exports during the same month amounted to 1,719,107 pikuls as compared with 1,291,380 for the preceding month. The exports of teak are much lower than for the same period in 1921.

The tender for ten locomotives, tenders and spare parts for Bangkok has been awarded to Messrs. Société de Construction des Batignolles of Paris, at the total price of fr. 2,988,000.

Netherlands East Indies

The quantity of sterilized milk imported into the Netherlands East Indies was more than double that of 1920, the United States supplying a very large percentage. Australia increased her supplies, but the United States still maintained first place. It is interesting to note that under the heading of "preserved fish," Canada appears for the first time; the imports being to the amount of 39,000 kilogrammes.

All industries are affected by the business depression; shipbuilding yards felt the competition for the first time of Hongkong and Germany.

Many factories had been planned, one for the manufacture of glass and bottles and another for acetic acid, but these have been abandoned for the time being, although it has been decided to build a sulphuric acid factory. A textile factory is to be erected in Java in the near future, and there are also plans for the building of a barrel factory and an up-to-date veneer furniture factory.

It should be remembered that the Netherlands East Indies is in an early stage of industrial development, and the critical years after the war have greatly hindered progress in this direction. It is believed that the next few years will show much progress in the electro-metallic industry, which is chiefly connected with the manufacture of manures, zinc ores and sulphuric acid.

IMPORT TRADE OF JAMAICA FOR 1921

Trade Commissioner G. R. Stevens

IV

13. GLASSWARE

(a) Glass Bottles.

	1920	Percentage	1921	Percentage
United Kingdom	£ 125	4	£ 9,390	38
United States	1,513	50	10,463	41
Canada	1,217	39	1,783	7
Germany	30	fractional	1,621	7

The retail price of bottles is high, and cheap German supplies are beginning to come in. Of the imports from the United Kingdom in 1921, about £6,500 represents supplies for Government departments. Canada's proportion of this trade is still small, but gives promise of increase in 1922.

(b) Glassware, n.o.p.

	1920	Percentage	1921	Percentage
United Kingdom	£ 7,565	22	£629	78
United States	24,486	74	167	20
Canada	284	1	7	fractional

The figures for 1920 include lamps, chimneys, and every kind of glassware except bottles; while those for 1921 cover only cut and etched glassware (for which there is but a small demand)—hence the discrepancy. The imports of chimneys and table glassware in 1921 are grouped under the heading of bottles (*a*), but are not differentiated in the customs returns. Canadian glass lighting fixtures sell well, and there is a good demand for thermos flasks.

14. HARDWARE

(a) Bags and Trunks.

	1920	Percentage	1921	Percentage
United Kingdom	£1,878	22	£1,157	36
United States	4,368	49	1,044	33
Canada	2,236	27	875	27

The business available in goods of this description is not large, but Canada's share of it could be increased by energetic salesmanship. Cheap lines are most in demand, but these encounter a certain amount of competition from locally manufactured articles. The wicker suitcase is very popular.

(b) Cordage.

	1920	Percentage	1921	Percentage
United Kingdom	£16,248	52	£6,491	42
United States	10,098	30	3,562	23
Canada	3,131	10	1,523	10
Cayman Islands	2,448	7	3,620	24

Of the imports during 1921 from the United Kingdom, Government supplies accounted for about £900, and that country was the chief supplier in both years. A cheaper grade of rope is manufactured in the Cayman Islands, a dependency of Jamaica, and is imported for use on small schooners in the coastwise trade.

(c) Artisans' Tools.

	1920	Percentage	1921	Percentage
United Kingdom	£10,602	19	£ 8,036	36
United States	41,881	80	12,941	62
Canada	111	fractional	314	1

Although the United States percentage declined considerably in 1921, with a corresponding increase in favour of the United Kingdom, the bulk of the

imports remained American, mainly on account of their cheapness. Jamaican importers as a rule buy through indent agents in London and New York, but few, if any, of them have Canadian buying connections. Hence Canada's share of this business is at present negligible.

(d) Gas Fixtures.

	1920	Percentage	1921	Percentage
United Kingdom	£8,727	71	£6,657	64
United States	3,327	27	742	7
Canada	159	fractional	2,945	29

Practically the only importer of gas fixtures in Jamaica is the Kingston General Commissioners, an official body which has charge of the lighting of the capital; they of course buy from British sources whenever possible. In the past they have obtained their supplies of gas mantles and other fittings chiefly from Great Britain, but Canadian manufacturers can get a share of their business by quoting competitive prices and supplying articles which conform to local requirements.

(e) Paints and Varnishes.

	1920	Percentage	1921	Percentage
United Kingdom	£21,580	50	£12,294	50
United States	19,679	41	7,623	32
Canada	4,024	9	1,410	fractional

Standard British paints and varnishes occupy a strong position in this field, because of their recognized excellence of quality; American lines are less popular. The diversion of a portion of this business to Canada is a question of price, quality, and salesmanship. There is a good market for kalsomines and distempers, and an energetic agent should be able to show good results in this line. A considerable amount of building is now in progress in the colony, and the market is far more promising than it was in 1920 and 1921. Liquid veneer is in good demand, and business could be developed in decorative plasters. There is, however, practically no sale for waxes or white lead, and only small quantities of linseed oil are used.

(f) Iron and Steel, n.o.p.

	1920	Percentage	1921	Percentage
United Kingdom	£20,547	27	£58,006	71
United States	44,080	59	19,100	24
Canada	8,749	11	4,090	5

The imports under this head comprised manufactures of every kind not included in any other category; such manufactures are not specified in the customs returns. In 1921 there was a large diversion of trade under this head from the United States to the United Kingdom, while Canada lost ground. As previously noted, Canada suffers in this regard from a lack of buying connections.

(g) Iron and Steel Bars.

	1920	Percentage	1921	Percentage
United Kingdom	£39,273	17	£19,973	21
United States	155,245	64	37,395	44
Canada	45,301	19	25,368	30

These imports included iron bars, steel bars and sheets, pig-iron and steel ingots. Of the total imports in 1920, roughly £195,000 represents supplies for the railway, purchased by the Government; in 1921 similar purchases were made to the extent of about £73,000. In the former year Canada supplied £39,000 worth of these railway materials, and in the latter £23,000. Apart from Government requirements, the market for such products is limited, as Jamaica possesses very few manufacturing industries.

(h) Iron, Galvanized.

	1920	Percentage	1921	Percentage
United Kingdom	£9,381	51	£15,356	69
United States	9,117	49	7,436	31
Canada	Nil		Nil	

Jamaica's purchases of galvanized iron in both years consisted of corrugated sheets for use in roofing. There is a large and steady demand for this product in the colony, and Canadian manufacturers would find it well worth while to bid for a share of this business. Taking into account the lower prices which prevailed in 1921, it will be seen that the imports during that year far exceeded in quantity those of 1920; this is the result of renewed activity in the building trade resulting from the fall in prices of labour and materials.

(i) Nails, Screws, and Rivets.

	1920	Percentage	1921	Percentage
United Kingdom	£ 4,131	11	£1,244	13
United States	17,981	49	4,027	41
Canada	14,639	40	4,327	44

The sale of all types of building smallware is controlled by the buying connections in London and New York of the handful of Jamaican hardware importers. However, Canadian prices on wire nails have held their own with American offerings; yet much more could be done if the Canadian exporters would pay stricter attention to this and other West Indian fields and not await the casual inquiries from their agents. In this latter connection the regular quotations of American houses are of great value to their local agents; whereas Canadian representatives are seldom in a position to furnish spot prices for immediate shipment. Canadian exporters of nails, screws, rivets, and all types of small hardware would do well to adopt a system of regular semi-monthly price lists designated for shipment before given date. Such a sales method would unquestionably increase their share of this business.

(j) Saddlery and Harness.

	1920	Percentage	1921	Percentage
United Kingdom	£23,451	77	£7,488	80
United States	7,724	23	1,764	20
Canada	4	fractional	Nil	

The market for goods of this class is comparatively limited, horse and mule transport having been superseded, to a great extent, by the motor car. English saddles are by far the most popular. It is very probable that the imports from the United Kingdom in 1920 included supplies for the police and military, although such supplies are not shown separately in the customs returns.

(k) Leather, n.o.p.

	1920	Percentage	1921	Percentage
United Kingdom	£19,102	63	£5,621	60
United States	10,799	33	3,596	39
Canada	440	1	15	fractional

The above returns comprise dressed and undressed leather and leather manufactures (except boots, shoes, and saddlery). There is a good opening for second-grade sole leathers, and smaller supplies of uppers and kids, but British and American competition is keen in these lines. There is no market for belting.

(l) Cutlery.

	1920	Percentage	1921	Percentage
United Kingdom	£8,865	59	£5,947	62
United States	5,703	38	2,540	24
Canada	24	fractional	29	fractional

Sheffield and Birmingham supply most of the cutlery imported into Jamaica. On account of their quality and reputation, the replacement of these goods by

any other is extremely improbable, but there does not appear to be any reason why Canadian cutlery should not compete with American. The chief difficulty, as noted under other items, is the lack of buying connections in the Dominion.

(m) Hardware, n.o.p.

	1920	Percentage	1921	Percentage
United Kingdom	£96,475	34	£46,618	44
United States	183,751	63	56,471	53
Canada	5,324	2	2,018	2

These imports consisted of cash registers, casket hardware, typewriters, and house, office and store furniture of iron and other metal. Steel office furniture is in fair demand, and a well-known Canadian line has lately entered the field, competing with American supplies which have hitherto controlled the market. Steel beds also sell well, and are imported very largely from the United States. There is a good opening for cheap aluminium and tin ware in mugs and basins; also for cheap japanned, enamelled and galvanized ware, kettles, frying pans, small braziers, ice cream freezers, and lawn mowers. American gas and kerosene stoves are popular, but the stove most in demand is the wood-burning type of a celebrated Scottish make.

Purchasing Agents.—It should be noted that the hardware trade of Jamaica is controlled by four or five large importing retailers, who obtain their supplies through purchasing agents in New York or London. The hardware merchant needs, say, small quantities of fifty different lines manufactured by thirty firms abroad. He makes up one order, forwarding it to his agent, and in due course the goods arrive in one shipment. Obviously, this plan is far more advantageous to the hardware merchant than separate transactions with thirty manufacturers in England or the United States. It is because Jamaican importers have no such buying connections in Canada that the volume of Canadian imports under this head is so small. The chief difficulty of Canadian participation in this indent business is that Canada is a limited market in which to purchase. Nevertheless, there are many lines manufactured in Canada which can meet any competition, and hardware is one of them. The organization of an indent business may not be easy, but it is perfectly feasible.

15. MACHINERY, N.O.P.

	1920	Percentage	1921	Percentage
United Kingdom	£22,815	30	£57,943	47
United States	40,808	49	38,885	32
Canada	14,907	20	23,199	20

This item includes marine, railway and tramway appliances, sewing and printing machines, pumps, and a very small proportion of non-enumerated industrial and manufacturing machinery. There is a fair demand for pumps, both power and hand, and small oil engines can be sold in small quantities. Business can be done in valves and similar castings for sugar machinery. Very little wood-working and metal-working machinery is used, and there is no market for mining, leather, or rubber-working machinery. An opening exists for road-making machinery, though British types are preferred by the Government.

16. DRY GOODS

(a) Musical Instruments.

	1920	Percentage	1921	Percentage
United Kingdom	£ 1,870	8	£3,008	30
United States	19,016	89	5,568	55
Canada	859	2	783	1

The musical instrument most in demand in Jamaica is the mouth organ, which has an enormous sale. Piano requirements are limited, but gramaphones

sell well, especially the cheap types. Church organs are in fair demand. Most of this trade is held by the United States, but latterly German organs have been coming in. A cheap Canadian gramaphone in the hands of an energetic agent should be able to command a fair share of the business.

(b) Paper, Printing.

	1920	Percentage	1921	Percentage
United Kingdom	£ 1,686	fractional	£5,936	22
United States	31,845	80	9,156	36
Canada	4,379	11	10,525	40

Newsprint requirements are limited in Jamaica, there being only one daily paper in the island, and only two weeklies of any importance. Government supplies are drawn from the United Kingdom, and accounted for over £5,000 in 1921. It is gratifying to note a substantial increase of imports from Canada during that year.

(c) Paper, Writing.

	1920	Percentage	1921	Percentage
United Kingdom	£11,015	40	£24,079	65
United States	12,300	41	9,540	26
Canada	2,946	12	2,310	7

This business is returning to the United Kingdom rapidly because of the greater diversity of British offerings and the ability of that source to supply an attractive article at a relatively low price. Canadian stationery is too high in quality for this field except for the limited requirements of the white population. There is, however, a good opening for Canadian sulphite bond in weights from 16 to 24 pounds, and more aggressive effort upon the part of Canadian paper exporters is all that is needed to secure a large share of this business.

(d) Paper, n.o.p.

The imports under this heading consist of wrapping paper, wallpaper, oil paper, corrugated paper cartons, and small quantities of other paper products. For wrapping paper Jamaica has returned to Holland, securing there the cheap straw paper which monopolized the market before the war. It is probable that not only the Dutch but a fair proportion of the British imports are German in origin. Because of the popularity of this straw paper, Canadian kraft can only command a small sale.

Wallpaper is comparatively limited due to the insect nuisance, but somewhat larger quantities have been arriving from Germany during the past year. Several British offerings of wallpaper have been noted, but they have been too expensive for consideration. It is questionable if any amount of business awaits Canadian manufacturers of this commodity.

THE GERMAN ZINC SHORTAGE

Holders of stocks of zinc in Germany are getting very nervous, as they see no prospects of renewing, and are carrying on from hand to mouth, according to *Kelly's Monthly Trade Review*. The upward movement of prices continues remarkable. Thus, while the price on January 1 this year was 2,075 marks per 220 pounds, it reached 4,485 marks on July 1 and nearly 17,000 marks on September 1, and we notice that the German Zinc Smelting Association, which issues daily quotations, has lately declined to quote any price. On September 1 last the German expert estimate of the available zinc stocks in all countries was to the effect that scarcely more than 75,000 metric tons were held on all hands, a figure considerably below last year's estimate; and as regards the total zinc output of the world for 1922, same is, according to a German estimate, held to be only about 392,000 tons.

CHINA'S REQUIREMENTS OF BELTING

ASSISTANT TRADE COMMISSIONER G. A. ROLF EMERY

Shanghai, November 1, 1922.—The manufacturing industries of China—engineering works, foundries, flour, cotton, silk fabrics and other mills—are steadily expanding. One essential requirement of all these industries is belting. Until recently China was forced to import all her requirements and as the import figures show a steady increase, to keep pace with her industrial expansion, Canadian exporters should take cognizance of this market.

Unfortunately, the China Maritime Customs Statistics only show the importations by value in Haikwan taels and not in quantities. From 1910 to 1920 the imports into China of machine belting as valued in Haikwan taels have shown almost continuous expansion. In 1910 the gross imports were valued at 156,246 Haikwan taels, in 1914 at 285,706, in 1919 at 768,361, in 1920 at 1,540,432, and in 1921 at 1,144,698 Haikwan taels. In 1921 the principal contributors were: United States, 337,444 Haikwan taels; Great Britain, 302,260; and Japan, 297,630 Haikwan taels. Canadian exports for that year were valued at 7,435 Haikwan taels.

To allow for a proper appreciation of the figures given, the equivalent of the Haikwan tael for the years stated was in gold at the average sight of exchange on New York as follows: 1910, $0.66; 1914, $0.67; 1919, $1.39; 1920, $1.24; and 1921, $0.76.

Imports of belting from Canada to China are very insignificant in comparison with those of Japan and the United States, which have developed enormously within the past few years.

TYPE OF BELTING REQUIRED

Leather is the best type of belting for China. A small amount of canvas belting is used, but it is not as serviceable as the leather unless it is oil- or paint-filled. Rubber-filled belting is not acceptable as through climatic conditions the rubber decomposes. The plain canvas belting too is affected by the damp climate of those parts of China wherein the factories are situated. The dampness in some way affects the weave, and after short use the belting begins to fall apart. Rubber-filled and covered belting and composition beltings are similarly not looked upon with as much favour as the leather. Some factories will not have a foot of it on their pulleys. Practically all the demand is now for leather belting.

The leather belting varies in width from one inch to eighteen inches and in plies from two to ten. As a rule none of the dealers stock belting with a greater range in width and plies than that outlined. Natural colour, oil dressed and waterproof meet with equal favour, but the latter is slightly more expensive and so is precluded from selling to some mills.

PRICES OF BELTING

In the early part of this year an agency in Shanghai was offering American rubber filled and covered belting at the following prices:—

Width	Plies	Per foot $	Width	Plies	Per foot $	Width	Plies	Per foot $
1	2	0.16	4	5	1.00	9	8	3.38
1	3	0.20	4	6	1.40	10	8	4.00
1½	3	0.30	4½	5	1.20	10	10	5.48
2	3	0.24	5	5	1.24	11	8	4.50
2	4	0.29	5	6	1.47	11	10	5.07
2½	4	0.52	6	5	1.40	12	8	4.70
3	4	0.57	6	6	1.76	12	10	5.53
3	5	0.84	6	7	2.03	14	8	5.50
3	6	0.97	6	8	1.65	16	8	6.08
3½	4	0.77	7	6	1.95	18	8	6.58
3½	5	0.90	7	8	2.62	18	10	7.38
3½	6	1.24	8	6	2.24			
4	4	0.93	8	8	3.20			

At the same time a German firm were offering English canvas belting at prices 20 per cent under these prices, and the American prices have now dropped to fully 20 per cent under their original prices.

On August 1, 1922, an American firm were offering leather belting at the following prices:—

		Per foot
Single waterproof	Cut rolls	G. $0.23
	Full "	0.22
	10 rolls and over for indent	0.21
Extra heavy single, natural or oil dressed	Cut rolls	G. $0.21
	Full "	0.19½
	10 rolls or more for indent	0.18½
Extra medium singles	Cut rolls	G. $0.18¾
	Full "	0.17½
	10 rolls or more for indent	0.16½

Other grades of singles at G. $0.14, G. $0.13, G. $0.12 and G. $0.12, G. $0.11, G. $0.10.

These prices gave the firm handling this particular belting a margin to cover their selling expenses and a profit of 28 per cent.

COMPETITION TO BE MET

From the foregoing it will be seen that the prices to be met are very low and such as will not allow any sellers in the market other than those who are sufficiently efficient in manufacturing, and low enough in price, to lay belting down in China at a more attractive figure for equal quality. A firm of belting manufacturers has been established in China recently, and it is offering a fair quality of leather belting at about one-third the American prices. This is due to low labour costs and cheap hides. The Germans have offered belting in the past month at what has been considered a ridiculously low figure. They, however, have certain concessions and working arrangements which enable them to cut in. It is thought the Russian Government is supplying superior hides at a very low price to the German manufacturers, and that some arrangement has been made between them as to profits. The new German belting is selling retail at about 10 per cent below the c.i.f. cost of American belting; some cheap source of leather must therefore be open to the German manufacturers. This German belting is of exceptionally good quality, and not once, where it has been tried out, has there been detected a wave or belly after a fair trial. Such competitive prices must force down the price for those firms who wish to enter the field.

CONDITIONS OF SALE

The condition of sale of belting to the mills is peculiar inasmuch as there may be as many as twenty mills controlled by one firm of exporters and importers. The control is exercised either through the purchase of stock or interlocking directorates. The natural result is that the purchase of supplies and belting is made through the firm exercising such control. Such a firm would have a belting agency or two, and as a result the buying is done from that agency which offers the better belting or the greater profit to the importer. If on the other hand all purchasing is done by the mill direct, then it is only natural that the buying should be done from that agency which is represented by a firm in China to which the mill is so closely allied. If belting is not sold through such a connection, it is handled independently by some energetic importer who has worked up a strong milling clientele either through " friend pidgin " or through service.

Of these two selling agencies, the latter would probably be of more benefit to Canadian exporters. The former type of firm has usually been linked up with manufacturers who have given very good service for some years. Consequently, this clientele demand the make of belting which they have been recommending and selling for some time. For them to press a new make in opposi-

tion to their old agencies would be contrary to their best policy, and as a result the new belting would not go as well as if it were handled by an energetic independent firm which has to sell on quality, price and service.

There is an opportunity in China for Canadian belting manufacturers if they are willing to offer an equal quality of belting at an equal or better price, and equal, if not better, service, if they are to compete against the long-established lines and secure a fair proportion of the trade.

REGISTRATION OF TRADE MARKS IN CHINA

Assistant Trade Commissioner G. A. Rolf Emery

Shanghai, November 20, 1922.—Greater interest in the rights of manufacturers possessing trade marks or chops is being displayed by the Peking Government than has heretofore been the case. Besides the central office in Peking under the jurisdiction of the Ministry of Agriculture and Commerce, that department has recently opened an office in Shanghai for the registration of trade marks. The office is located at 25 Jinkee Road, Shanghai. Another Trade Mark Registration Bureau has been opened at Tientsin, which will undertake the registration of trade marks within the jurisdiction of the Tientsin Maritime Customs. The opening of these offices will be welcomed by Canadian exporters selling to China, as through them and the British Consulates a certain degree of protection is given.

PROTECTION AFFORDED IN CHINA

By international treaties and under reciprocal arrangements made through the system of extra territoriality which obtains in China, foreigners are guaranteed protection in their own consulates against fellow countrymen, and against certain other nationalities, in the use of their trade marks. Manufacturers of Great Britain, France, Germany, Belgium, Italy, Denmark, the United States, Portugal and the Netherlands have their trade marks protected against their fellow-countrymen and countrymen of the group of countries named, through such a reciprocal arrangement. This only applies when such trade marks or chops are registered in the consulates in China of the country of the manufacturer. No such reciprocal arrangement exists between Great Britain and Japan although some agreement has been come to between the United States and Japan.

The protection afforded by these, especially as between foreigners of different nationalities in China, is very inadequate. This was borne out in the judgment given in the Shanghai Mixed Court in September, 1922. In an application for the registration of the silk reeling invention "Hofer," made by Burkhardt, Amidani & Co., judgment was given that "there are no provisions in China for the protection and registration of foreign patents, and the court has no power to grant the declaration asked for."

Redress would probably be given if the infringers of a patent were of any of the nationalities of the group given above and claimed the protection of their consulate, but that would only hold true if the patent were registered in the consulate in China of the patentee and would not be given if the patentee were outside the group, or if the one to infringe were beyond the jurisdiction of the power granted through the system of extra territoriality.

Despite the many loopholes still available for those who infringe upon trade marks, chops and patents in China, it is satisfactory to note the action taken by the Peking Government as showing an awakening of interest, and it is probable that in the course of a few years adequate protection will be given to foreigners in China in this matter.

FORTHCOMING EXHIBITIONS AND FAIRS

Great Britain

British Industries Fair, White City, London, and Castle Bromwich Aerodrome, Birmingham—
February 19 to March 2, 1923. Apply to British Trade Commissioners in Montreal, Toronto or Winnipeg.

Ideal Homes Exhibition—
Olympia, March 4th-17th, 1923. Organized by Associated Newspapers, Ltd., 130, Fleet Street, London, E.C. 4.

Brewers' and Allied Trade Exhibition—
Industrial Hall, Edinburgh. March 14-24th. Organized by T. Williamson, Esq., Industrial Hall, Annendale Street, Edinburgh.

International Domestic Economy and Trade Exhibition—
Hull, April 20-May 5, 1923. Apply: Northern Counties Trades Exhibitions, Royal Chambers, Midland Street, Hull.

Other Countries

Belgian Agricultural Machinery Exhibition—
Brussels, February 17-26, 1923. Organized by Societé Mecanique et d'Industrie Agricole.

Brussels Motor Cycle and Cycle Exhibition—
Palais d'Egmont, February 24-March 7, 1923. Apply to: Secrétariat Général, 64, Rue de Enseignement, Brussels.

Zagreb Samples Fair—
March, 1923.

Lyons Spring Fair—
March 1-15, 1923.

Prague Sample Fair—
March 11-18, 1923. Official Representative for Great Britain, Mr. J. Sykora, 26, Gloucester Road, London, N.W. 1.

Barcelona International Samples Fair—
March 17-28. Organizing Committee, Plaza Antonio Lopez 15, Barcelona.

Cologne Samples Fair—
Spring, 1923.

Milan Samples Fair—
April, 1923.

TENDERS INVITED

New Zealand

Copies of specifications have been received from Mr. W. A. Beddoe, Canadian Trade Commissioner, Auckland, for equipment for the Public Works Tenders Board, Wellington. These specifications are open for inspection at the Commercial Intelligence Branch of the Trade and Commerce Department, Ottawa. Tenders should be addressed to the Secretary, Public Works Tenders Board, Wellington, in accordance with these specifications.

No.	Date of closing	Particulars.
S.M. 148	March 27, 1923.	11 oil-switches complete with current transformers and operating mechanism; 10 control panels complete; 15 three-phase air brake switches; 22 sets of isolating switches; 6 sets of choke coils; 6 galvanized steel structures; 6 sets spare parts as specified. Oil.
S.M. 150	March 20, 1923.	110 galvanized steel transmission line towers, complete with cross-arms, ground-stubs, and accessories.
S.M. 149	March 27, 1923.	6 three-phase arresters; 6 sets of spares.
S.M. 152	Feb. 27, 1923.	5,350 suspension insulator-strings complete with all ironwork for attaching to cross-arm and cable; 1,550 strain insulator strings complete with all ironwork for attaching to cross-arm and cable; 240 tie-down insulator strings complete with all ironwork for attaching to cross-arm and cable clamp; 2,000 complete attachments for ground wire.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING JANUARY 9, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement on the nominal closing quotations for all the principal exchanges for the week ending January 9, 1923. Those for the week ending January 2 are also given for the sake of comparison:—

		Parity	Week ending Jan. 2, 1923.	Week ending Jan. 9, 1923.
Britain . . . . £	1.00	$4.86	$4.6941	$4.6732
France . . . . Fr.	1.	.193	.0749	.0677
Italy . . . . Lire	1.	.193	.0527	.0489
Holland . . . . Florin	1.	.402	.3986	.3981
Belgium . . . . Fr.	1.	.193	.0688	.0619
Spain . . . . Pes.	1.	.193	.1594	.1581
Portugal . . . . Esc.	1.	1.08	.0505	.0502
Switzerland . . . . Fr.	1.	.193	.1898	.1903
Germany . . . . Mk.	1.	.238	.000142	.000092
Greece . . . . Dr.	1.	.193	.0118	.0125
Norway . . . . Kr.	1.	.268	.1917	.1881
Sweden . . . . Kr.	1.	.268	.2732	.2709
Denmark . . . . Kr.	1.	.268	.2086	.2042
Japan . . . . Yen	1.	.498	.4950	.4926
India . . . . R.	1.	2s.	.3182	.3166
United States . . . . $	1.	$1.00	1.0103	1.0053
Mexico . . . . $	1.	.498	.4937	.4988
Argentina . . . . Pes.	1.	.424	.3851	.3782
Brazil . . . . Mil.	1.	.324	.1187	.1130
Roumania . . . . Lei	1.	.198	....	....
Jamaica . . . . £	1.	4.86	4.6979	4.6822
British Guiana . . . . $	1.	1.	.9806—.9831	.9770—.9782
Barbados . . . . $	1.	1.		
Trinidad . . . . $	1.	1.		
Dominica . . . . $	1.	1.		
Grenada . . . . $	1.	1.		
St. Kitts . . . . $	1.	1.		
St. Lucia . . . . $	1.	1.		
St. Vincent . . . . $	1.	1.		
Tobago . . . . $	1.	1.		
Shanghai, China . . . . Tael	1.	.708	.7249	.7275
Batavia, Java . . . . Guilder	1.	.402	.3952	.3933
Singapore, Straits Settlements . . $	1.	.567	.5556	.5529

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "THE COMMERCIAL INTELLIGENCE BRANCH OF THE DEPARTMENT OF TRADE AND COMMERCE, OTTAWA," OR THE BOARDS OF TRADE AT ST. JOHN, HALIFAX, SHERBROOKE, MONTREAL, PETERBOROUGH, TORONTO, WOODSTOCK, ST. MARY'S (ONT.), WINNIPEG AND VANCOUVER; THE CHAMBERS OF COMMERCE AT HAMILTON, ST. CATHARINES, STRATFORD, BRANTFORD, LONDON, AND VICTORIA (B.C.); BORDER CHAMBER OF COMMERCE, WINDSOR; THE CANADIAN MANUFACTURERS' ASSOCIATION OFFICES AT TORONTO, MONTREAL, WINNIPEG, VANCOUVER AND VICTORIA; AND THE KITCHENER AND WATERLOO MANUFACTURERS' ASSOCIATION, KITCHENER (ONT.).

Cereals

960. WHEAT.—A firm of commission agents in Rotterdam are interested in representing a large Canadian exporter of Manitoba wheat Nos. 1, 2 and 3.

961. WHEAT.—A commission firm in Amsterdam wish to hear from exporters of Manitoba wheat Nos. 1, 2 and 3.

962. WHEAT.—A firm of importers in Rotterdam desire to get into touch with Canadian exporters of Manitoba wheat Nos. 1, 2 and 3.

963. WHEAT.—Canadian concerns wishing to develop a trade in wheat in Holland are invited to communicate with a firm of importers in Rotterdam.

964. WHEAT.—A Dutch firm with good connections in various parts of Europe wish to represent a Canadian exporter of wheat for Germany, Austria and Czecho-Slovakia.

965. WHEAT.—A Dutch commission house would like to represent a Canadian exporter of Manitoba wheat Nos. 1 to 3.

966. RYE.—A large firm in Amsterdam are anxious to get into touch with Canadian concerns in a position to export regularly rye "Western No. 2."

967. RYE.—A Dutch importer of rye would be glad to hear from Canadian firms.

968. RYE.—Western No. 2 rye is of interest to a firm of commission brokers in Amsterdam.

969. RYE.—Western rye Nos. 1 and 2 are asked for by a concern in Rotterdam, Holland.

970. RYE.—A concern in Holland are interested in importing Western rye Nos. 1 and 2 from Canada.

971. RYE.—Shippers of rye from Canada who want to do a trade in Holland are requested to write to a commission firm in Rotterdam.

972. RYE.—Rye is of interest to a large firm of commission agents and importers in Holland.

973. RYE.—Dutch commission brokers would like to have samples and prices on Western Nos. 1 and 2 rye.

974. MAIZE.—A concern in Holland desire to enter into communication with an exporter of mixed No. 2 maize with a view to representation.

975. MAIZE.—Mixed No. 2 maize is desired by commission brokers in Holland.

976. MAIZE.—A firm in Holland are open to receive quotations from exporters of No. 2 mixed maize.

977. MAIZE.—Mixed No. 2 and white No. 2 maize are of interest to a commission house in Holland.

978. MAIZE.—An importer in Holland desires to be placed in touch with Canadian exporters of mixed maize No. 2. He is sometimes also interested in yellow and white maize No. 2.

979. MAIZE.—Mixed No. 2 maize is of interest to a firm of commission agents in Holland.

980. MAIZE.—An importer in Rotterdam would like to get into touch with Canadian exporters of maize.

981. OATS.—A Dutch firm of importers are desirous of hearing from exporters of oats from Canada.

982. OATS.—Dutch importers would like to hear from Canadian exporters of oats wishing to be represented in Holland and various parts of Europe.

983. OATS.—A Rotterdam firm wish to represent a good Canadian exporter of clipped Western No. 2 oats.

984. OATS.—A Dutch importer would be glad to hear from Canadian exporters of white oats.

985. BARLEY.—Canadian exporters of Canadian Western feeding barley No. 3 are invited to communicate with a firm in Holland with a view to representation.

986. BARLEY.—Canadian exporters of brewing and feeding barley Nos. 2 and 3 are invited to communicate with a firm of commission brokers in Holland.

987. BARLEY.—Commission agents in Rotterdam want to hear from Canadian exporters of Western No. 3 barley for brewing purposes.

988. BARLEY.—Barley Nos. 1 and 2 are of interest to a Dutch importer.

989. BARLEY.—Canadian feeding or malting barley is required by a Dutch firm. Quotations are requested on Nos. 2 and 3.

990. HAY.—A Dutch firm would be glad to hear from exporters of Canadian hay.

991. HAY.—A large firm in northern Holland wish to hear from Canadian exporters of hay.

992. BARLEY.—Canadian barley exporters are invited to communicate with a Dutch firm well connected in Europe, with a view to representation.

993. BARLEY.—A firm in Holland want to hear from Canadian exporters of barley.

994. OATS.—A Rotterdam firm desire to import oats from Canada, principally Nos. 2 and 3, and clipped in bulk.

995. OATS.—Large grain commission brokers in Rotterdam would be glad to hear from Canadian exporters of Nos. 2 and 3 oats.

996. OATS.—A Dutch house is interested in representing Canadian exporters of Canadian No. 3 oats.

997. OATS.—A Rotterdam firm of commission agents desire to hear from Canadian exporters of white clipped No. 2 and white Western No. 3 oats.

998. BUCKWHEAT.—A firm of commission agents in Holland are particularly anxious to get into touch with a Canadian firm in a position to export No. 2 buckwheat.

General Foodstuffs

999. ROLLED OATS.—A large Dutch importing concern are anxious to receive quotations, prices and all possible particulars from Canadian exporters of rolled oats.

1000. ROLLED OATS.—A good Canadian rolled oats mill wishing to be represented in Holland is invited to communicate immediately with a Dutch firm.

1001. FLOUR.—A firm in Amsterdam with a branch office in Hamburg and agencies at Bremen, Copenhagen, Christiania, Danzig, Wiborg, Prague, Vienna and Cologne are desirous of representing a large Canadian flour mill in a good position to export to Europe.

1002. FLOUR.—A commission firm in Holland would like to get into touch with a good Canadian flour mill. Patents, straights and first clears mostly required.

1003. FLOUR.—Flour exporters in Canada are invited to send samples and quotations for straights and patents to a Dutch firm.

1004. FLOUR.—A Dutch firm are very desirous of representing a large Canadian flour mill in a position to do a regular export trade to Holland.

1005. FLOUR.—An importing firm in Holland wish to be placed in touch with a flour mill in Canada in a position to export patents, straights and first clears.

1006. LINSEED CAKES.—Canadian firms in a position to export linseed cakes are asked to send prices to a concern in Rotterdam.

1007. LINSEED CAKES.—Canadian manufacturers of linseed cakes are asked to send prices, terms, etc., to a firm of commission agents in Holland.

1008. LINSEED CAKES.—Canadian manufacturers of linseed cakes are invited to communicate with a firm in Holland.

1009. CORN SYRUP.—Canadian manufacturers of corn syrup should communicate with a large firm in Holland interested in the importation of same.

1010. SYRUP.—Light golden cane syrup is of interest to an importing firm in Holland. Polarization not higher than 68; barrels of about 200 kg.

1011. SUGAR.—A large firm of Dutch importers would be glad to receive prices, quotations, etc., from Canadian exporters of sugar.

1012. SUGAR.—A concern in Groningen would like to hear from a large Canadian sugar refinery with a view to representation in Holland. Prepared to give a year's trial by buying on their own account.

1013. YELLOW CANE SUGAR.—A firm in northern Holland are desirous of importing yellow cane sugar with a polarization of 88 or lower. Samples.

1014. GRANULATED SUGAR.—A firm in Holland are interested in importing granulated sugar in bags of 50 kg. from Canada.

1015. HONEY.—Canadian honey is of interest to a Dutch firm of importers.

1016. CANNED FRUIT.—A Dutch house wish to represent a good Canadian packer.

1017. DRIED AND EVAPORATED APPLES.—A Dutch importing firm are desirous of having quotations. Samples and all necessary particulars from Canadian packers of dried and evaporated apples, innings, quarters and wholes.

1018. APPLE WASTE.—Dried apple cores and pealings from Canada are of interest to Dutch firm of importers who have imported large quantities in the past.

1019. CONDENSED MILK.—A concern in Holland are interested in the importation of condensed milk. Manufacturers are therefore invited to submit offers.

1020. COCOA POWDER.—Dutch importers would be glad to hear from Canadian manufacturers of cocoa powder with a view to opening up business.

1021. STARCH.—Canadian manufacturers of starch are requested to communicate with a Dutch firm desirous of importing this commodity.

1022. DAIRY PRODUCE.—A Scottish firm of produce brokers, merchants and commission agents with representatives in Glasgow, Aberdeen, Dundee and Edinburgh, desire to get in touch with those Canadian exporters of eggs, butter and bacon, who are not already represented in Scotland.

1023. TROPICAL PRODUCTS, JAMS, SALTED MEAT AND BACON.—A firm in Naples, Italy, effecting payments against 90 days draft, would like to import from Canada, tropical products, jams, salted meats and bacon.

1024. TROPICAL PRODUCTS, GROCERIES.—A firm in Bari, Italy, doing business on its own account and as representatives, would like to import tropical products and groceries from Canada.

1025. BACON, BUTTER AND CHEESE.—A Liverpool firm desire to represent Canadian exporters of butter, bacon and cheese on an agency basis.

1026. CODFISH, CANNED SALMON.—A firm in Florence, Italy, doing business on its own account, would like to hear from Canadian exporters of codfish and salmon.

1027. CODFISH, STOCKFISH, DRIED FISH AND LARD.—A firm in Genoa, Italy, doing business as commission agents, or on its own account, prices c.i.f., Italy, would like to import codfish, stockfish, dried fish and lard.

1028. SALMON, LARD, CODFISH, ETC.—A firm in Milan, Italy, doing business on a cash basis, would like to hear from Canadian exporters of salmon, lard, codfish, and similar commodities.

1029. Canned Salmon.—A firm in Leghorn, Italy, doing business on its own account, would like to hear from Canadian exporters of canned salmon.

1030. Salmon, Codfish, Tropical Products.—A firm in Milan, Italy, doing business on a commission basis, would like to import Canadian salmon, codfish, tropical products.

1031. Codfish, Salmon, Lard.—A firm in Piedmont, Italy, would like to hear from Canadian exporters of codfish, salmon, lard.

1032. Canned Salmon.—A large import concern in Holland desire to import canned salmon regularly. Canadian exporters should therefore submit prices, quotations and full particulars.

1033. Frozen Fish.—A big distributor of fish and other sea products in Japan desires to hear from Canadian exporters in a position to supply frozen salmon, herring, tuna, and any other frozen fish products.

1034. Frozen Whale Meat.—A large Japanese import house desires to hear from Canadian whaling companies in a position to supply frozen whale meat to Japan. The company is only interested in this business in a big way and desire to know how much firms interested can supply and at what price.

1035. Beef Fat.—A Groningen, Holland, firm wish to have quotations on first quality beef fat, "Premier Jus" for consumption in tins of 20 k.g., kegs of 1 cwt., or tierces of about 170 k.g.

1036. Store Cattle.—A cattle salesman in South Wales would like to get into touch with Canadian shippers of store cattle.

1037. Packing House Products.—A Dutch firm are interested in representing Canadian packers of edible fats, bacon, ham, corned beef and packing house products.

Miscellaneous

1038. Hardware and Tools.—A Dutch firm are interested in the importation of agricultural implements, household articles, steel and wooden products and all kinds of tools. Canadian firms should send catalogues and quotations. They are particularly anxious to get into touch with an export firm representing several factories.

1039. Hay Forks.—A Dutch firm in Groningen, Holland, are desirous of importing 2 and 3 prong hay forks from Canada. They would like to have catalogues and prices.

1040. Iron Wire.—A concern in Groningen, Holland, are interested in the importation of iron wire.

1041. Tools and Hardware.—A large wholesale and retail firm in Groningen, Holland, are interested in tools and hardware of all kinds.

1042. Hides.—A firm in Florence, Italy, doing business on its own account are desirous of communicating with Canadian exporters of hides.

1043. Hides, Skins and Tanned Leather.—A firm in Milan, Italy, doing business on a cash basis are desirous of securing hides, skins and tanned leather.

1044. Hides, Skins and Tanned Leather.—A firm in Naples, Italy, doing business on its own account, are desirous of securing hides, skins and tanned leather.

1045. Hides and Skins.—A firm in Leghorn, Italy, doing business on a cash basis or on the opening of confirmed credit, are desirous of securing hides and skins.

1046. Hides, Skins and Tanned Leather.—A firm in Catania, Italy, doing business against opening of credit through a bank, are desirous of securing hides, skins and tanned leather.

1047. Hides, Skins, Chemicals and Cereals.—A firm in Genoa, Italy, are desirous of securing hides, skins, chemicals and cereals.

1048. Hides, Skins, Leather, etc.—A firm in Milan, Italy, doing business on its own account, are desirous of securing hides, skins, leather, lumber and celluloid.

1049. Hides and Skins.—A firm in Milan, Italy, doing business c.i.f. prices port of destination and effecting payments against documents are desirous of securing hides and skins.

1050. Hides, Skins, Boots and Shoes.—A firm in Vigevano, Italy, are desirous of securing hides, skins, boots and shoes.

1051. Hides and Skins.—A firm in Genoa, Italy, doing business as wholesalers, are desirous of securing hides and skins.

1052. Hides, Skins and Grain.—A firm in Genoa, Italy, doing business on its own account or as representatives are desirous of securing hides, skins and grain.

1053. Hides, Skins, Boots and Shoes.—A firm in Turin, Italy, doing business as representatives are desirous of communicating with Canadian exporters of hides, skins, boots and shoes.

1054. Hides, Skins, Cereals and Cotton.—A firm in Milan, Italy, doing business on a commission basis and on their own account, are desirous of securing hides, skins, cereals and cotton.

1055. Hides, Skins, Boots, etc.—A firm in Turin, Italy, are desirous of communicating with Canadian exporters of hides, skins, boots, shoes and umbrellas.

1056. Hides, Skins, Cereals.—A firm in Naples, Italy, doing business direct or as representatives, are desirous of securing hides, skins and cereals.

1057. Hides, Skins, and Tanned Leather.—A firm in Allessandria, Italy, doing business as representatives, and also against opening of credit if so requested, are desirous of securing hides, skins and tanned leather.

1058. Hides, Skins, Boots, Shoes, etc.—A firm in Turin, Italy, doing business on their own account are desirous of communicating with Canadian exporters of hides, skins, boots, shoes and slippers.

1059. Hides, Skins, Boots and Shoes.—A firm in Bologna, Italy, doing business as representatives and on their own account, are desirous of communicating with Canadian exporters of hides and skins, also boots and shoes.

1060. Hides and Skins.—A firm in Milan, Italy, doing business on a cash basis, are desirous of securing hides and skins.

1061. Hides and Skins.—A firm in Milan, Italy, effecting payments against presentation of documents are desirous of securing hides and skins.

1062. Hides, Skins, Furs, etc.—A firm in Rome, Italy, are desirous of communicating with Canadian exporters of hides, skins, furs, boots and shoes.

1063. Leather, Tanned Leather, etc.—A firm in Milan, Italy, doing business direct as wholesalers and on a cash basis, are desirous of communicating with Canadian manufacturers of tanned leather, leather and saddlery leather.

1064. Tanned Leather.—A firm in Turin, Italy, doing business on a cash basis or effecting payments after 30 days arrival of goods, are desirous of communicating with Canadian manufacturers of tanned leather.

1065. Tanned Leather.—A firm in Milan, Italy, doing business on its own account, are desirous of communicating with Canadian exporters of tanned leather.

1066. Leather.—A firm in Milan, Italy, doing business on its own account desire to hear from Canadian exporters of leather.

1067. Tanned Leather, Metals.—A firm in Naples, Italy, doing business either as representatives or on a commission basis are desirous of securing tanned leather and metals.

1068. Furs.—A firm in Milan, Italy, doing business as representatives, are desirous of communicating with Canadian exporters of furs.

1069. Furs.—A firm in Milan, Italy, are desirous of communicating with Canadian exporters of furs. This firm are doing business on a cash basis.

1070. Furs.—A firm in Naples, Italy, doing business on opening of credit, are desirous of securing furs.

1071. Small Electrical Motors and Apparatus, Tools and Wood Working Machinery.—An established Antwerp firm desire to represent Canadian firms exporting electrical apparatus, such as small motors for electrical apparatus for polishing parquet flooring, etc., etc.

1072. Canned Fish, Chemicals and Drugs.—A firm in Genoa, Italy, doing business on its own account would like to import Canadian canned fish, chemicals and drugs.

1073. Codfish, Cellulose (Woodpulp).—A firm of representatives in Genoa, Italy, would like to import codfish, cellulose (woodpulp).

1074. Chemical and Fertilizers.—A firm in Holland are desirous of receiving samples and prices from Canada for sulphate of ammonia, bone meal, and flour, superphosphates, basic slag, nitrate of ammonia, and all kinds of chemical manures.

1075. Natural Gas Carbon Black.—A London firm of chemical merchants in the north of England desire to get into communication with manufacturers of natural gas carbon black.

1076. Cement.—A firm of importers in Groningen, Holland, are desirous of having quotations for Canadian cement.

1077. Cement.—A Dutch firm is open to receive samples and prices of Canadian cement.

1078. Oils, Fats and Woods.—A firm of brokers and agents in Mannheim, Germany, having good connections with consumers, desire to get in touch with Canadian exporters of oils, fats, etc., for the soap, margarine and wax industries, also with Canadian exporters of all kinds of woods.

1079. Asbestos.—An old-established firm of brokers and agents in Hamburg, Germany, desire the representation for Germany of a Canadian asbestos mine not already represented in that country.

1080. Asbestos.—A firm in Hamburg, Germany, having connections with leading German industrial concerns wish to undertake the sole representation of Canadian asbestos mine owners for the whole of Scandinavia and Germany.

1081. Ground Mica.—Inquiry is made by a London firm of mineral merchants for names of Canadian exporters of ground mica.

1082. Lumber.—A Dutch firm would like to have quotations on Canadian lumber, similar to Swedish white wood, thickness of 2, 2½, 3 and 4 inches by 5, 6, 6½, 7, 8, 10 and 11 inches in width, no special lengths.

1083. Poplar.—A firm in Zwole, Holland, are prepared to receive quotations for Canadian poplar logs, grade sizes, 30 inches and upwards.

1084. Oak Boards.—A Dutch firm are in the market for oak boards, 1, 1½, 2, 2½ and 3 inches in thickness by 8 inches and upwards in width. No special lengths. Canadian concerns are invited to send prices and terms.

1085. Maple.—A firm of motor coach builders in the south of Scotland are in the market for bird's eye maple 3-ply ⅛-inch veneer and ask for names of Canadian exporters.

1086. Plywood.—An importer in Holland will be glad to hear from Canadian manufacturers of plywood of birch, cedar or oak, from 3 to 5 plies, in sheets of 50 by 50 inches or 50 by 60 inches and 4, 6, 8, 10 and 12 m.m. in thickness. Samples and quotations should be submitted.

1087. Skis.—A Japanese import house which has done business for some years with Swiss exporters of skis, would be glad to have catalogues and prices from Canadian manufacturers with a view to business in 1923.

1088. Tools.—Canadian manufacturers of hand tools of various descriptions are invited to send catalogues and prices to importers in northern Holland.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From St. John

To London.—Canadian Commander, Canadian Government Merchant Marine, Ltd., Jan. 24.

To Manchester (via Halifax).—Manchester Division, Furness, Withy & Co., Ltd., Jan. 18.

To Liverpool.—Marburn, Canadian Pacific Steamships, Ltd., Jan. 19; Canadian Seigneur, Canadian Government Merchant Marine, Jan. 24; Montclare, Canadian Pacific Steamships, Ltd., Jan. 26; Marloch, Canadian Pacific Steamships, Ltd., Feb. 2.

To Glasgow.—Canadian Voyager, Canadian Government Merchant Marine, Ltd., Feb. 15; Marburn, Canadian Pacific Steamships, Ltd., Feb. 16 (via Liverpool).

To London.—Canadian Victor, Canadian Government Merchant Marine, Jan. 24; Cornish Point, Furness Line, Jan. 31.

To Cardiff and Swansea.—Canadian Otter, Canadian Government Merchant Marine, Jan. 31.

To Belfast.—Ballygally Head, Head Line, Jan. 25.

To Dublin.—Carrigan Head, Head Line, Jan. 21; Ballygally Head, Head Line, Jan. 25.

To Cork.—Carrigan Head, Head Line, Jan. 21.

To Rotterdam and London.—Grey County, I.C. Transports, Ltd., Jan. 20.

To London and Rotterdam.—Brant County, I.C. Transports Ltd., Feb. 15.

To Bermuda, Barbados, Trinidad and Demerara.—Mattawa, Canadian Pacific Steamships, Ltd., Jan. 27; Montezuma, Canadian Pacific Steamships, Ltd., Feb. 10.

To Havre and Hamburg.—Welland County, I.C. Transports, Ltd., Jan. 23.

To Rotterdam and Hamburg.—Ramore Head, Head Line, Jan. 15.

To Australia and New Zealand.—Trevessa, New Zealand Shipping Co., Jan. 25; Erroll, New Zealand Shipping Co., Feb. 20.

To South Africa.—Palma, Elder, Dempster & Co., Ltd., Jan. 25.

To Hull (via Halifax).—Lexington, Furness Line, Feb. 3.

To Cherbourg, Southampton, and Hamburg.—Melita, Canadian Pacific Steamships, Ltd., Feb. 10.

To Bordeaux and St. Nazaire.—Lisgar County, I.C. Transports, Ltd., Jan. 25.

To Australian Ports.—Canadian Scottish, Canadian Government Merchant Marine, Jan. 20.

To Near East, India, and Java.—A steamer, Ellerman-Bucknalls, January.

From North Sydney

To St. John's (Nfld.).—Kyle, Reid-Newfoundland Co., Tuesday, Thursday and Saturday every week; Sable I., Farquhar Steamship Co., every Saturday.

From Halifax

To Queenstown and Liverpool.—Ausonia, Cunard-Anchor-Donaldson Line, Jan. 29; Andania, Cunard-Anchor-Donaldson Line, Feb. 10.

To Liverpool.—Canada, White Star-Dominion Line, Feb. 25.

To Glasgow.—Assyria, Cunard-Anchor-Donaldson Line, Jan. 29.

To Londonderry and Glasgow.—Assyria, Cunard-Anchor-Donaldson Line, Jan. 29.

To Plymouth, Cherbourg, and Hamburg.—Antonia, Cunard-Anchor-Donaldson Line, Feb. 2.

To NEWFOUNDLAND.—Canadian Sapper, Canadian Government Merchant Marine, Jan. 27.

To BERMUDA, BARBADOS, TRINIDAD, AND DEMERARA.—Royal Mail Steam Packet Co.'s ships, Jan. 19, and every fortnight thereafter.

To GUANTANAMO, SANTIAGO (CUBA), AND KINGSTON (JAMAICA).—Ottar, Pickford & Black, Jan. 17.

To BARBADOS, TRINIDAD, AND DEMERARA.—Canadian Beaver, Canadian Government Merchant Marine, Jan. 27.

To SANTIAGO (CUBA), KINGSTON, MONTEGO BAY AND ST. ANN'S BAY (JAMAICA).—Andalusia, Pickford & Black, Jan. 31 and Feb. 28.

To HAMILTON (BERMUDA), NASSAU (BAHAMAS), KINGSTON (JAMAICA), AND BELIZE (BRITISH HONDURAS).—Canadian Forester, Canadian Government Merchant Marine, Feb. 8.

To AUSTRALIA AND NEW ZEALAND.—Canadian Constructor, Canadian Government Merchant Marine, Jan. 20.

To GUANTANAMO, SANTIAGO (CUBA), AND KINGSTON, (JAMAICA).—Ottar, Pickford & Black, Jan. 16 and Feb. 14.

From Vancouver, B.C.

To HONOLULU, SUVA, AUCKLAND, AND SYDNEY.—Niagara, Canadian-Australasian Royal Mail Line, Jan. 26.

To YOKOHAMA, KOBE, NAGASAKI, SHANGHAI, MANILA AND HONG KONG.—Empress of Asia, Canadian Pacific Steamships Ltd., Feb. 22.

To YOKOHAMA, KOBE, SHANGHAI, AND HONG KONG.—Empress of Australia, Canadian Pacific Steamships, Ltd., Jan. 18.

To YOKOHAMA AND KOBE.—Hakata Maru, Nippon Yusen Kaisha, Jan. 31; Tokiwa Maru, Nippon Yusen Kaisha, Feb. 18.

To YOKOHAMA, KOBE, HONG KONG, AND MANILA.—Talthybius, Blue Funnel Line, Jan. 27.

To AUSTRALASIAN PORTS.—Canadian Scottish, Canadian Government Merchane Marine, Jan. 20.

To AUCKLAND, MELBOURNE, ADELAIDE, AND SYDNEY.—Hauraki, Canadian-Australasian Royal Mail Line, Feb. 8.

To THE ORIENT.—Canadian Winner, Canadian Government Merchant Marine, Jan. 31.

To LONDON AND LIVERPOOL.—Electrician, Harrison Direct Line, Feb. 2.

To LONDON, GLASGOW, LIVERPOOL, AND ROTTERDAM.—Loch Katrine, Royal Mail Steam Packet Co., early January.

To LONDON, ROTTERDAM, HAMBURG, AND ANTWERP.—Kinderdyk, Royal Mail Steam Packet Co., end January.

To SYDNEY.—Waihemo, Canadian-Australasian Royal Mail Line, Feb. 10.

To WELLINGTON, MELBOURNE, ADELAIDE AND SYDNEY.—Waiotapu, Canadian-Australasian Royal Mail Line, about Feb. 23.

ITALIAN GRAIN DUTIES FURTHER SUSPENDED

Trade Commissioner W. McL. Clarke, Milan, Italy, cables: "Tariff further suspended on wheat, oats, rye, till 30th June, 1923, and reduced on wheat flour from 115 to 47 gold lire metric ton." (See also *Commercial Intelligence Journal* No. 961 (July 1, 1922, page 12).)

INCREASED PRICES OF GERMAN IMPLEMENTS

The cartel of the German agricultural-machine industry has increased prices 100 per cent on an average since September 15, 1922, says the United States *Commerce Reports*. There has been no evidence of a decreased domestic demand, and all factories have orders which it will take months to fill. The cartel considers that the outlook for the export trade in its products is good.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 248 St. James street, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic.

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address, Canadian.*

Australia.

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium.

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil.

Major E. L. McColl. Address for letters—Caixa (P.O. Box) 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies.

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China.

J. W. Ross, Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba.

Address: 400 and 401 Teniente Rey 11, Havana. (Post-office Box 1290.) *Cable Address, Cantracom.*

France.

Lieut-Col. Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany.

L. D. Wilgress, Care British Consulate-General, Hamburg. (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland.

Norman D. Johnston, Zuidblaak 26, Rotterdam. *Cable Address, Watermill.*

India and Ceylon.

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy.

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica.

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan.

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico.

C. Noel Wilde, Care British Consulate-General, Mexico City.

New Zealand.

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa.

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements.

P. W. Ward, P.O. Box 121, Singapore. (Territory covers Straits Settlements, British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2. England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

A. B. Muddiman, Sun Building, Clare Street, Bristol. *Cable Address, Canadian.*

Major Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States.

Frederic Hudd, 44 Whitehall Street, New York City. *Cable Address, Cantracom.*

CANADIAN COMMERCIAL AGENTS

Australia.

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark.

C. E. Sontum, Grubbegd, No. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies.

R. H. Curry, Nassau, Bahamas.

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

Vol. XXVIII January 20, 1923 No. 990

United States Tariffs and Canadian Export Trade
German Currency and the German Trade Situation
Trade of Ceylon: Opportunities for Canadian Goods
Sugar Production and the Sugar Trade of Italy
Business Conditions: Australia; the United States
Import Trade of Chile in Transportation Materials, etc.
Railways of Brazil and the Market for Railway Supplies
Trade Inquiries for: Cereals and Allied Products; Canned, Dried and Evaporated Fruits; Milk Products; Hides and Leather; Rubber Goods; Binder Twine, Etc.

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
Hon. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

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TABLE OF CONTENTS

Commercial Intelligence Journal

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TRADE COMMISSIONER P. W. WARD'S ITINERARY IN CANADA

Mr. P. W. Ward, Canadian Trade Commissioner in Singapore, is now in Ottawa, and the itinerary for his business tour in the Dominion has been partially arranged, as follows:—

Toronto	January 18 to 30.
Montreal	January 31 to February 14.
Brockville	February 16
Kingston	February 19 to 20.
Oshawa	February 21.
Guelph	February 22.
Hamilton	February 26 to 28.
Welland, St. Catharines and Thorold	March 1 to 3.
Brantford	March 5 to 6.
Galt	March 7.
Kitchener	March 8.
Stratford	March 9.
Windsor and Walkerville	March 12 to 15.
Chatham	March 16.
Ottawa	March 19.

Firms in Toronto and Montreal who desire to be brought in touch with Mr Ward, or to interview him, should direct their communications to him, care of Canadian Manufacturers Association, or the Secretary of the Board of Trade, in these cities, and in the case of Hamilton to the care of the Secretary of the Chamber of Commerce in that city. In all other cities and towns included in the itinerary, requests for interviews should be addressed to the Secretary of the local Chamber of Commerce or Board of Trade.

A tour to points in Quebec and the Maritime Provinces will follow, commencing at Sherbrooke on March 26, the details of which will be announced later.

REPRESENTATIVES MUST KNOW THEIR LINES

The first step in arranging for foreign representation is to negotiate with a firm that has the necessary qualifications as regards character and ability, and there is a second step that must be taken if a steady and sound business is to be developed, says the United States *Commerce Reports*. The second step consists in placing that agency upon a really efficient basis by educating the agent regarding his products. This is especially important in the case of apparatus that has unique technical features or in the case of special appliances that experience has shown can have a volume of sale developed only through certain selling methods.

If the purely technical advantages only must be thoroughly impressed upon the representative, the matter is not so difficult, provided the right kind of representative has been selected in the first place who can readily appreciate the engineering features involved and can digest the useful data that has usually been worked up by the manufacturer to facilitate the sale of the apparatus. The engineering experience necessary to make suitable applications of the apparatus is supposedly one of the qualifications upon which the manufacturer has based his selection of the agent. In the matter of placing before representatives a complete technical knowledge of the product which they were selling, German manufacturers have always been very thorough. In many lines, not only have they prepared exhaustive treatises on their own products, but they have outlined salient points of competing lines. The latter, however, as a rule, was destructive rather than constructive criticism.

EXPORTS FROM CANADA TO THE UNITED STATES OF PRINCIPAL COMMODITIES SUCH AS ARE PRODUCED ON CANADIAN FARMS, OR MANUFACTURED DIRECTLY FROM SUCH FARM PRODUCTS, DURING THE MONTH AND THREE MONTHS ENDED DECEMBER, 1919 to 1922; WITH UNITED STATES TARIFF RATES IN FORCE.

(COMPILED BY THE EXTERNAL TRADE BRANCH, DOMINION BUREAU OF STATISTICS)

Commodities		Month of December				Three Months ended December				United States Tariff Rates in force		
		1919	1920	1921	1922	1919	1920	1921	1922	Prior to May 27, 1921	From May 27, 1921 to Sept. 21, 1922	Subsequent to Sept. 21 1922
Animals (except for Improvement of Stock)—												
Cattle	No.	63,627	29,295	15,103	14,391	264,893	153,271	100,175	93,087	Free	30 p.c.	(a)
	$	5,578,093	2,175,724	352,193	437,708	23,947,923	11,738,878	1,806,018	2,521,195			
Horses	No.	235	251	232	110	767	729	570	531	10 p.c.	10 p.c.	(b)
	$	43,669	56,264	36,562	13,123	129,563	207,540	110,917	72,610			
Poultry	No.	97,922	164,471	152,183	117,566	435,740	484,705	496,995	350,540	1c. per lb.	1c. per lb.	3c. per lb.
	$	109,811	195,078	166,622	142,328	445,964	543,326	490,133	343,670			
Sheep	No.	15,226	21,796	3,901	1,424	124,136	105,210	41,157	28,817	Free	(c)	$2 per head
	$	176,941	172,448	22,770	12,757	1,286,966	937,956	209,841	187,461			
Fruits—												
Apples, green or ripe	Brl.	42,191	1,194	16,375	4,979	143,575	10,123	387,161	60,081	10c. per bush.	30c. per bush.	25c. per bush.
	$	162,921	6,716	84,235	24,389	581,220	48,203	1,983,598	279,802			
Apples, dried	Lb.	96,518	....	320,710	....	156,627	....	618,160	....	1c. per lb.	1c. per lb.	2c. per lb.
	$	17,547	....	38,713	....	28,414	....	71,652	....			
Berries, fresh	$	1,584	7,040	5,278	4,933	31,092	23,542	30,450	49,294	½c. per qt.	½c. per qt.	1c. per lb.
Grains—												
Barley	Bush.	1,410	....	....	....	1,464	128	....	936,623	15c. per bush.	15c. per bush.	20c. per bush.
	$	2,083	....	....	....	2,182	128	....	497,645			
Beans	Bush.	58	137	2,632	7,620	846	357	2,634	19,511	25c. per bush.	$1.20 per bush	$1.05 per bush.
	$	224	759	6,729	20,826	2,892	1,964	6,737	50,688			
Buckwheat	Bush.	13,370	67,107	30,134	104,893	14,536	78,845	53,364	132,170	Free	Free	10c. per cwt.
	$	19,789	77,537	20,917	87,681	21,888	93,278	41,744	107,881			
Oats	Bush.	757,194	134,960	601,426	51,975	861,072	209,346	829,588	115,984	6c. per bush.	6c. per bush.	15c. per bush.
	$	646,449	88,796	256,156	25,562	720,235	146,131	368,949	56,954			
Pease, whole	Bush.	14,600	2,950	10,129	26,071	26,470	12,070	56,039	65,168	10c. per bush.	10c. per bush.	60c. per bush.
	$	95,553	18,998	28,882	53,090	169,043	76,049	177,558	119,948			
Pease, split	Bush.	100	....	8,082	767	2,860	....	13,482	2,067	20c. per bush.	20c. per bush.	75c. per bush.
	$	420	....	29,529	2,727	8,168	....	50,997	7,017			
Rye	Bush.	33,933	110,531	2,490	321,668	236,141	243,635	68,972	434,715	Free	Free	15c. per bush.
	$	52,329	176,337	1,595	247,155	326,027	401,618	56,279	333,237			
Wheat	Bush.	1,359,800	12,234,449	3,365,601	3,089,285	1,629,483	29,169,956	9,172,155	8,671,483	Free	35c. per bush.	30c. per bush.
	$	2,953,762	24,796,861	3,629,210	3,454,468	3,580,693	65,478,618	10,260,239	9,340,175			
Grain Products—												
Bran, shorts and middlings	Cwt.	25,218	157,442	22,419	273,872	252,255	413,196	241,619	944,382	10 p.c. or Free	10 p.c. or Free	15 p.c.
	$	56,847	269,145	22,552	305,551	567,484	770,632	231,468	1,004,092			
Wheat Flour	Brl.	1,271	194,181	83,143	54,899	2,491	521,477	226,203	189,878	Free	20 p.c.	78c. per cwt.
	$	13,972	1,985,425	471,836	342,832	27,516	5,723,301	1,411,717	1,092,284			
Meats—												
Bacon, hams, shoulders and sides	Cwt.	1,148	228	120	90	4,716	958	350	298	Free	25 p.c.	2c. per lb.
	$	28,400	9,412	3,506	3,374	121,474	38,821	11,220	10,451			
Beef, fresh, chilled or frozen	Cwt.	29,793	24,715	31,859	10,079	120,738	98,314	95,166	74,147	Free	2c. per lb.	3c. per lb.
	$	454,994	356,381	348,204	105,734	1,855,519	1,413,579	1,002,625	880,367			

Mutton and lamb, fresh, chilled or frozen	Cwt.	4,492	8,744	14,890	13	21,213	39,072	44,817	12,091			
	$	97,812	215,463	272,040	254	447,016	997,361	741,447	294,192	Free	2c. per lb.	(d)
Pork, fresh, chilled or frozen	Cwt.	715	629	1,088	624	3,334	3,671	2,476	1,877			
	$	22,676	30,799	29,982	16,358	70,131	136,149	67,923	54,486	Free	2c. per lb.	¾c. per lb.
Pork, dry-salted and pickled	Cwt.		451		1	1,278	622		5			
	$		7,420		36	35,755	9,795	9	99	Free	25 p.c.	2c. per lb.
Poultry, dressed or undressed	$	20,023	308,896	502,374	324,033	33,033	358,952	611,513	405,055	2c. per lb.	2c. per lb.	6c. per lb.
Other meats, including canned meats, but excluding extracts	Cwt.	4,483	1,446	990	696	13,671	6,704	3,441	2,496			
	$	56,853	25,374	9,078	10,762	181,578	106,286	34,667	49,620	Free	25 p.c.	20 p.c.
Milk and milk products—												
Butter	Lb.	373,685	288,902	389,491	998,123	4,105,779	1,439,608	2,301,493	1,655,033			
	$	212,663	135,646	155,962	430,082	2,285,352	722,798	856,193	695,331	2½c. per lb.	6c. per lb.	8c. per lb.
Cheese	Lb.	485,579	8,224	170,221	362,100	2,957,022	94,739	2,447,912	1,930,800			
	$	130,922	3,375	29,346	70,938	775,071	27,366	372,253	361,009	20 p.c.	23 p.c.	(e)
Cream	Gal.	34,004	51,773	87,546	89,633	180,502	306,248	383,409	360,712			
	$	56,269	87,883	127,353	177,815	306,902	502,908	576,143	644,856	Free	5c. per gal.	20c. per gal.
Milk, fresh	Gal.	175,304	67,977	111,174	84,615	641,413	316,127	384,147	235,699			
	$	57,683	24,062	26,530	19,342	197,132	103,272	88,927	51,342	Free	2c. per gal.	2½c. per gal.
Milk, condensed, including milk powder	Lb.	1,103,028	1,088,105	5,924	803,046	2,280,549	2,700,699	38,715	3,376,852			
	$	199,127	190,895	749	89,486	383,705	407,640	7,877	435,180	Free	2c. per lb.	1c.—1½c. lb.
Seeds—												
Clover seed, alsike	Bush.	15,233	5,052	15,405	5,951	54,583	8,155	39,532	16,305			
	$	370,108	67,842	133,918	38,676	1,392,570	109,787	355,342	109,201	Free	Free	4c. per lb.
Clover seed, alfalfa and red	Bush.	2,060		320		2,060	3	353				
	$	55,455		3,552		55,455	45	3,948		Free	Free	4c. per lb.
Clover seed, other	Bush.	10,612	163	2,910	17,510	20,635	1,522	4,000	27,158			
	$	171,562	1,620	10,841	83,556	331,048	10,683	16,009	126,281	Free	Free	(f)
Flaxseed	Bush.	119,188	546,204	477,301	789,183	221,104	668,016	1,343,991	1,191,625			
	$	593,417	1,059,904	892,536	1,603,598	1,054,413	1,411,670	2,506,849	2,477,137	20c. per bush.	30c. per bush.	40c. per bush.
Grass seed	Bush.	5,453	13,999	9,288	13,947	14,482	23,248	39,578	24,371			
	$	12,633	27,815	41,793	26,248	44,534	47,447	163,712	46,523	Free	Free	2c. per lb.
Vegetables—												
Potatoes	Bush.	490,174	105,958	53,632	71,678	2,227,508	1,098,939	342,965	186,637			
	$	597,869	96,425	41,712	55,903	2,380,042	1,015,577	329,766	154,983	Free	25c. per bush.	50c. per cwt.
Sugar beets	Ton.	2,155	3,721	2,843		6,713	9,428	10,291	11,430			
	$	19,345	33,779	17,135		61,145	84,664	62,011	56,730	5 p.c.	5 p.c.	80c. per ton
Turnips	Bush.	416,081	338,919	285,432	323,151	1,302,750	1,071,859	1,076,882	1,165,672			
	$	194,873	83,134	73,621	39,727	523,956	252,849	290,647	167,000	15 p.c.	15 p.c.	12c. per cwt.
Miscellaneous Products—												
Eggs	Doz.	1,545	31,885	3,846	3,321	58,998	114,478	109,755	68,859			
	$	1,099	19,530	2,324	1,841	37,029	76,280	52,818	29,374	Free	Free	8c. per doz.
Hay	Ton	16,337	10,257	148	1,212	45,690	30,394	360	2,798			
	$	261,377	229,245	2,996	13,227	726,631	689,981	7,482	31,276	$2 per ton	$2 per ton	$4 per ton
Maple sugar	Lb.	82,158	7,556	353,025	9,679	484,701	730,167	893,946	105,351			
	$	24,127	1,741	25,017	2,505	141,814	187,722	64,620	24,089	3c. per lb.	3c. per lb.	4c. per lb.
Tallow	Cwt.	4,127	2,155	3,386	474	14,844	5,078	6,043	1,958			
	$	70,794	13,999	18,617	2,746	231,311	41,974	33,194	13,468	Free	Free	½c. per lb.
Wool	Lb.	444,710	2,296,174		523,060	1,476,039	3,020,099	107,455	2,819,553			
	$	288,023	533,673		151,727	923,530	746,687	10,614	860,019	Free	(g)	(g)
Total value of above commodities	$	13,930,098	33,591,441	7,942,965	8,443,098	46,473,416	95,691,457	25,576,106	24,045,052			

(a) Cattle weighing less than 1,050 pounds, 1½c. per lb.; 1,050 pounds or over, 2c. per lb. (b) Horses valued at not more than $150 each, $30 per head; more than $150 each, 20 per cent. (c) Sheep, one year old or over, $2 per head; less than one year old, $1 per head. (d) Mutton fresh, 2½c. per lb.; lamb, fresh, 4c. per lb. (e) Cheese, 5c. per lb. but not less than 25 per cent. (f) Clover seed, crimson, 1c. per lb; white, 3c. per lb. and other, 2c. per lb. (g) Dutiable at various rates. See *Commercial Intelligence Journal* No. 974, Sept. 30, 1922, pages 516-7.

GERMAN CURRENCY AND TRADE SITUATION

TRADE COMMISSIONER L. D. WILGRESS

Hamburg, December 23, 1922.—A feeling of uncertainty and apprehension as to the future continues to dominate commercial circles in Germany to an ever-increasing extent. During the month of December fear of the much-dreaded trade and financial crisis has become more pronounced. In any review of the present situation in Germany it is difficult to deal with economic considerations apart from political, and prominence must be given to questions of currency and foreign exchange, as these have overshadowed all other factors in German trade and commerce during the last three years.

CURRENCY INFLATION

The inflation of the German currency continues at a rapid pace. According to the return of the Reichsbank for December 15, the note circulation amounted to 970,202,013,000 paper marks. This represents an increase over the return of the previous week of no less than 123,307,728,000 marks. The following figures taken from a recent issue of the London *Times* clearly show the progression of the inflated note circulation during the past year:—

		Notes in Circulation
December 31, 1921	Marks	113,639,464,000
March 31, 1922	"	130,671,352,000
June 30, 1922	"	169,211,792,000
September 30, 1922	"	316,869,799,000
December 1, 1922	"	754,092,109,000
December 8, 1922	"	846,894,285,000
December 15, 1922	"	970,202,013,000

The last three amounts in the above table give an indication of the rate at which inflation is now proceeding. With the inflation of the currency there has been a corresponding expansion in the floating debt, and it has become increasingly difficult for the Government to sell its treasury bills to the public. The Reichsbank return for December 15 showed the amount of discount and treasury bills held to be 828,742,258,000 marks, an increase of 102,055,981,000 marks during the week.

THE GOLD RESERVE

Although the figures of inflation of the German currency appear so formidable, a factor of great potential value is the gold reserve of the Reichsbank, which at the current rate of exchange is nearly twice the total value of the note issue. This gold reserve is said to amount to $250,000,000, whereas the note issue of about 1,000 billion marks amounts at the present rate of exchange (about 7,000 to the dollar) to approximately $143,000,000. Another factor to be taken into consideration is the great scarcity of currency. In spite of the activity of the printing press, the constant rise in prices creates such a demand for currency as a medium of exchange that there is almost a continual shortage. It was these and other considerations which led the foreign experts committee to report to the German Government last November that it would be possible to stabilize the value of the mark, given a strict control of German public finances and a settlement of the reparations question with a moratorium.

DISCOUNTING THE FUTURE

The fact, indicated above, that the gold reserve of the Reichsbank is nearly twice the value of the note issue at the current rate of exchange would appear to show that the business world has already discounted the progressive

inflation of the German currency for some time ahead. This would further seem to be proved by the marked difference between the external and internal values of the paper mark. Certainly the German internal price level, although constantly rising, is still below the general world level. During the month of December, however, the rate of exchange remained relatively stationary and at one period the mark even underwent a sharp rise. The result has been that the difference between the external and internal values of the mark has narrowed very considerably, and the German price level has more nearly approximated to that of the rest of the world. The advantage which German export trade derives from the depreciated mark would therefore appear to partly depend upon the extent to which the progressive inflation of the currency has been discounted in the external value of the mark. This advantage would disappear with stabilization, while with an appreciating mark German export trade would suffer a corresponding disadvantage.

EFFECTS OF APPRECIATION

The effects which even a small appreciation of the mark would have on German export trade were well illustrated during the current month. In the middle of December the mark commenced to rise, owing it was ascribed to rumours of a large American loan. In a few days the dollar declined from 8,000 marks to 5,500 marks. A subsequent recovery soon set in, and the dollar is now quoted at 7,000 marks, but during the period when the dollar was lowest prices in Germany approached and in many cases exceeded general world prices. Thus British coal in Hamburg became cheaper than German coal. Manufacturers and exporters, who have become accustomed to quote in some stable foreign currency, were suddenly confronted with a situation involving them in possible losses, for with labour and other expenses to be met in marks an appreciation in the value of the mark could easily bring about a heavy loss on each transaction. It would also make it impossible for German goods in many lines to compete on the world's markets. It is therefore easy to understand that commercial circles in Germany fear a sudden appreciation in the external value of the mark and the consequent financial and trade crisis which it would bring about. At the best it is hoped that stabilization may be brought about at as near as possible to the current rate of exchange and in such a way as not to cause any violent derangement to German export trade, or else that stabilization may be deferred until the worst period of the present world trade depression is passed.

RELATIVELY STEADY RATE OF EXCHANGE

The present rate of exchange of 7,000 marks to the dollar is over 1,000 marks less than the rate quoted at the beginning of November, so that it may be said that for nearly two months the mark has suffered no depreciation in external value. On the other hand, there has been a steady and constant rise in prices corresponding to the inflation of the currency, so that during this period there has been a depreciation in the internal value of the mark. A relatively steady rate of exchange has therefore resulted in a gradual reduction of the difference between the two values of the mark. It is of interest to emphasize this point, since it is from the difference between the internal and external values of the mark that the German export trade derives whatever advantage there is in a depreciated exchange. Since the greater part of the raw materials for German industry must be imported from abroad, this advantage chiefly shows itself in low wages of labour, and it is in those articles in which the labour cost forms a relatively high proportion of the whole that Germany has been best able to undersell foreign competitors on the world's markets.

DIFFICULTIES OF IMPORT OF RAW MATERIALS

Apart from political considerations, Hamburg firms give as one explanation of the comparatively steady rate of exchange during the past month the fact that Germany has been buying relatively little from abroad. The import trade in grain, lard, wool, cotton, minerals, and hides has been very quiet during December. This may be in large measure ascribed to seasonal influences and renewed buying may be expected after the New Year. On the other hand, it is becoming evident that German firms are experiencing increasing difficulties in financing the importation of raw materials and that this is beginning to be reflected in the import trade.

Manufacturing in Germany continues to enjoy a "boom." The home demand, in spite of increasing prices, shows few signs of slackening. The depreciation of the currency has turned a thrifty people into a nation of spenders. Since the mark has been decreasing in value there has been a general endeavour to turn money into goods as fast as possible. Every sharp drop in the exchanges brings about a period of panic buying by the public. The multiplicity of taxes induces another form of spending by industrial and commercial firms and a large amount of reconstruction of premises, plant and machinery has been undertaken. Export trade has received an impetus from the advantages derived from the depreciated mark, and Germany has been able to re-establish most of her pre-war connections in overseas markets. All these factors have contributed to a great demand for manufactured goods, which has kept German factories fully employed. The great difficulty has been the importation of raw materials from abroad. Firms with an export trade have been able to finance the buying of raw products with the foreign balances which they have been able to accumulate through the sale of their goods abroad. Firms supplying chiefly the home market have not been in so fortunate a position, and various means have had to be resorted to for securing renewed supplies of raw materials at enhanced prices in marks. The raising of new capital has been among the subterfuges adopted for this purpose.

It would appear that in certain industries the position is even arising in which the price of the finished article will be less in gold value than the raw materials imported for its manufacture. It is felt that such a state of affairs cannot continue indefinitely. On all sides there is a pronounced shortage of working capital, so that even large firms find great difficulty in financing their purchases of raw material. Textile firms request 50 per cent with order before accepting orders for special lines from foreign buyers. A reduction in the time allowed for payment of bills is taking place in nearly all industries. The leading German banks have no longer sufficient resources to enable them to finance the importations of raw materials on a large scale and increasing reliance must be placed on foreign credits.

GERMAN TRADE WITH CANADA

Many of the representatives of Canadian importing houses who have come to Germany to buy have not realized their expectations. Either they have not been able to buy as cheaply as they hoped, or else business has been made impossible through uncertainty as to time of delivery or through the requirement of a considerable advance with order. German firms for some time have been unable to quote firm prices in marks, while during the past year the custom has become general of quoting prices for export in some stable foreign currency, Dutch gulden and American dollars being the most common. The number of lines which can be sold ex stock by German manufacturers is very limited, and in most cases no guarantee can be given as to time of delivery. It should be remembered that all trade with foreign countries is controlled by the official

Foreign Trade Bureaux, who fix the prices at which goods may be sold abroad and grant the export licenses without which no shipment can be made. However, the trade returns and the reports of shipping companies indicate that German goods are being exported to Canada in increasing quantities. The articles shipped would appear to be mostly those in which labour forms a large proportion of the total cost of production, and are what may be described as " German specialties," such as toys, dolls, glassware, crockery, dyes, artificial fertilizers and potash.

THE TRADE OF CEYLON

Trade Commissioner H. A. Chisholm

A CONTENTED AND WELL-ADMINISTERED COLONY

Calcutta, November 23, 1922.—The island of Ceylon, whose romantic history of warring native dynasties dates from several centuries before the Christian era, is now one of the brightest and most valuable of the British Crown colonies. Ceylon's position on the threshold of the Far East would alone make her a most invaluable British possession, for Colombo, her capital, is a port of call for all ships plying eastward from Europe to Japan, China, Australasia, the Straits Settlements, Java, Siam, Burma, and Eastern India.

Ceylon's population of some 4½ millions consists largely of native Tamils and Sinhalese with a sprinkling of Eurasians and Hindus. About 70 per cent of this population is concentrated in the extremely fertile and beautiful south-western quarter of the island, where most of the tea, rubber, spices, and cocoanut products are produced. Two-thirds of Ceylon is a dry, almost waterless, level tract of jungle, growing little but timber, and where not even the present sparse population could live were it not for the numerous " tanks " or artificial lakes constructed by the Government of the colony. All portions of the island are linked together by magnificent motor roads. Primary education of all classes of the inhabitants has been highly developed and the entire population is contented and well governed. A seditious outbreak occurred in 1915, which was promptly suppressed, and Ceylon remains but little affected by the seditious movements so active in India during recent years.

CEYLON'S PRINCIPAL PRODUCTS

Tea.—In 1921 tea accounted for nearly 50 per cent of the total value of Ceylon's exports. Although the amount exported dropped to 160,000,000 pounds as compared with 185,000,000 pounds shipped during the previous year, the higher tea prices ruling in the world's markets gave a value to last year's output of 1,127 lakhs of rupees*, as compared with 808 lakhs of rupees for 1920. The tea manufactured during 1921 was of a particularly high grade, as the aim of the exporter was to put on the market good quality teas in order to counteract the effects of the temporary glut in the market experienced in 1920 and early 1921. The average price obtained for pure Ceylon teas increased from an average of 44 cents per pound in 1920 to no less than 70 cents per pound in 1921. The British Empire consumes 90 per cent of Ceylon teas. Of the 145,000,000 pounds supplied to the British Empire in 1921, the United Kingdom purchased 111,000,000 pounds, Australia and New Zealand some 20,000,000 pounds, and Canada 4,500,000 pounds. The United States took over 14,000,000 pounds of the 16,500,000 pounds shipped to countries outside the British Empire. During the first six months of 1922, total exports of Ceylon teas amounted to 92,000,000 pounds valued at 645 lakhs of rupees. The tea estates

* Note.—A lakh of rupees is worth approximately $30,000 gold.

of Ceylon are financially in a most enviable position. Their prosperity has a favourable effect on the trade of the island, as a generous proportion of the imports of the island is destined for the tea estates.

Rubber.—Rubber is second in importance only to tea as an export commodity from Ceylon. The rubber industry in Ceylon as well as in other parts of the world has been through a period of severe depression owing to over-supply and low prices. Now that the prices of crude rubber have advanced materially owing to recent announcements in regard to restriction of outputs throughout the rubber-producing districts of the East, Ceylon's second commodity will be in an excellent position. It is claimed that the cost of production of rubber in Ceylon is less than it is in the Straits Settlements owing to the lower wages paid to estate labourers. Ceylon's export of crude rubber in 1921 totalled 787,000 cwt.—a very small decrease from the previous year's figure of 791,000 cwt. In 1921 about 60 per cent of Ceylon's rubber output went to the United States, while most of the remainder was shipped to the United Kingdom. During the first six months of 1922, however, of the 48,000,000 pounds of rubber exported from Ceylon, nearly 34,000,000 pounds were shipped to the United States and only 10,000,000 pounds to the United Kingdom.

Cocoanut Products.—The exports of cocoanut products from Ceylon in 1921 showed a considerable expansion over the previous year. The total value of cocoanut products exported amounted to over 650 lakhs of rupees. While this figure was very little larger than that of the previous year owing to lower prices ruling, the volume of shipments of fresh cocoanuts, copra, desiccated cocoanut and fibre increased considerably. The United States absorbs nearly half of the desiccated cocoanut exported, and Germany and the United Kingdom take the remainder. The United Kingdom and Continental Europe absorb nearly all the copra and cocoanut oil.

Other products.—Tea, rubber, and cocoanut products represent some 95 per cent of Ceylon's total exports. The remaining products exported, therefore, are of quite minor importance. These commodities in order of their importance are cacao, arecanuts, coir fibre, citronella oil, poonac, plumbago, coir yarn, tobacco, skins, and cardamons.

DIRECTION OF CEYLON'S FOREIGN TRADE

In 1921 over 40 per cent of Ceylon's total exports, which were worth some $80,000,000, went to the United Kingdom, 22 per cent to the United States, 4 per cent to Germany, 3 per cent to British India, 3 per cent to Australia, 2 per cent to Denmark, and nearly 2 per cent to Canada.

While the British Empire absorbs about 60 per cent of Ceylon's exports, nearly 80 per cent of Ceylon's imports are supplied by the British Empire. In 1921 the United Kingdom supplied 25 per cent of the total, British India 24 per cent, Burma 23 per cent. United States products represented less than 3 per cent of the total imports, Japanese 1½ per cent, while imports from the whole of Continental Europe amounted to less than 3 per cent. The total value of the import trade in 1921 was nearly $80,000,000.

British India has 25 per cent of Ceylon's trade, consisting chiefly of rice, coal, and cotton goods. Burma's share of the total imports is large because Ceylon is a heavy importer of Burmese lead, oil, and rice. The most of the United Kingdom's trade with Ceylon represents cotton goods.

Ceylon's industrial requirements are very limited. The European population is less than ten thousand out of a total of 4½ millions. Her industrial activity is confined largely to tea factories. Little therefore is required in the way of machinery. The great mass of her inhabitants live on rice and locally grown foodstuffs.

Opportunities for Canadian Goods in Ceylon

In view of the fact that Ceylon's requirements of foreign goods outside India, Burma and the United Kingdom are very limited, and that her imports from the United States constitute only 3 per cent of the total, the opportunities for Canadian trade are strictly limited. There are certain commodities, however, now imported from the United States and Japan, among which Canadian exporters may find some opportunities. The following are some details concerning the commodities in which Canadian exporters may be able to compete.

Chemical products.—With reasonable prospects of higher rubber prices the market for acetic acid (used for coagulating rubber) should show considerable expansion. Canadian acetic acid enjoyed a good market in Ceylon during the war when Germany was eliminated as a competitor. It appears, however, that Germany has now succeeded in capturing this market. During the six months ended June, 1922, some 34,000 gallons of acetic acid were imported. Of this total over 20,000 came from Germany, 9,000 from Japan, and 3,000 from Holland, and only 333 gallons from Canada. Canadian acetic acid is well liked in Ceylon, but this year it is impossible for other countries to offer much competition in face of current low German prices.

Calcium carbide.—While Canadian calcium carbide is making good headway in India, very little of it enters Ceylon. At least half the carbide now appearing on the markets in Ceylon is Norwegian, while most of the remainder is Swedish or German. Only 666 cwts. of calcium carbide were imported into Ceylon during the first six months of 1922.

Sulphuric acid.—Some 6,000 gallons of sulphuric acid were imported into Ceylon during the first six months of 1922, half of this total coming from Japan and the remainder from British India and the United Kingdom.

Disinfectants and insecticides.—Disinfectants and insecticides were imported into Ceylon during the six months to a total value of Rs. 42,000—all from the United Kingdom with the exception of a little from Australia and Belgium.

Drugs, medicines, etc.—During the half year drugs and medicines to the value of some $300,000 were imported. Of this total over 80 per cent was from the United Kingdom. The United States share was worth about $25,000, and Canada figures to the extent of about $100. Two or three Canadian manufacturers of patent medicines are doing quite well in India. There is no reason why these firms should not extend active operations to Ceylon, as any advertising conducted in India always helps sales in Ceylon. Patent nerve foods and tonics are as popular in Ceylon as they are in India.

FOODSTUFFS

Grain and flour.—Ceylon imports only a few thousand tons of oats and wheat flour from Australia and India. The great mass of the population lives on rice.

Meats and fish.—Australia supplies Ceylon with small amounts of frozen and salted beef and mutton, while her supplies of bacon and ham come from both the United Kingdom and Australia.

Canned salmon.—The only meat or fish food imported into Ceylon in which Canada would have any interest is canned salmon. A few odd small shipments of British Columbia salmon reach Ceylon, but the well-known canned salmon brands are Alaskan. Several hundred thousand pounds of tinned fish are imported annually into Ceylon, of which nearly 50 per cent is American canned salmon. The remainder is chiefly Scotch herrings and Portuguese sardines. The Ceylon merchants require their canned salmon in one-pound

talls in attractive labels and with brightly stencilled ends stamped with monogram. No tins should be sent to this part of the world unless they are rust-proof. A dull coloured tin cannot be sold. The chief demand is for pinks, with chums second and reds third. At the present time the most popular brand is "Express Brand-Alaska".

Ceylon buys tinned and frozen butter, chiefly from Australia and to some extent from India. Biscuits and confectionery are practically all English. Two-thirds of the beer is from the United Kingdom and the remainder from Germany.

Californian canned fruits are more popular than any other brands imported into Ceylon, but Australian jams have made considerable headway in recent years in competition with English. During the first six months of the current year two-thirds of the imported jams were Australian, which has the great virtue of being cheaper than English jams. There is probably no market for Canadian jams in Ceylon in competiton with Australian. There may be an opportunity, though, for Britsh Columbian canned peaches, apricots and pears in competition with Californian. This fruit is so attractively put up, however, that any competing lines would have great difficulty in getting any business unless a product equal in quality and appearance but slightly lower priced were put on the market.

Preserved milk.—Condensed and evaporated milk is another trade in which Australia is making marked headway. Australia supplied two-thirds ot the 300,000 pounds of tinned milk imported during the first six months of the current year, as compared with only a fourth of the total quantity imported during the first six months of 1921. For the present American milk interests seem to be beating out Swiss milk. Any attractive-looking brand of condensed milk of good quality will sell in Ceylon providing a very slight inducement is offered in the way of price. During June of this year a consignment of 4,500 lbs. of Canadian condensed milk arrived at Colombo.

MISCELLANEOUS PRODUCTS

Tea chests.—Japanese Momi tea chests are for the present supreme in the Ceylon market. During the first six months of 1922, tea chests and shooks to the value of over $300,000 were imported into Ceylon, and of this total Japanese chests represented 70 per cent. The well-known English tea chests have not made nearly the headway in Ceylon that they have in India. The Japanese Momi now being imported into Ceylon seems to be of rather an inferior quality of wood resembling white spruce. Much of this Momi at the present time is small and knotty. It is said that the Japanese procure their wood for these chests from Siberia. The shooks to make one standard 19-inch by 19-inch by 24-inch tea chest this year are costing about 45 cents each c.i.f. Colombo. Canada is making a bid for this trade, and during the first six months of the current year shipped to Ceylon 5,000 tea chests as compared with only twelve chests during the corresponding period of 1921. Several firms in Colombo, whose names can be secured by writing to the Director, Commercial Intelligence Service, Ottawa, would be only too glad to furnish any Canadian manufacturers of box shooks with sample Momi tea chests. Chances for Canadian success in this business depend largely on price.

Motor cars and trucks.—The market for motor cars both new and second hand in Ceylon has been severely depressed for several months owing to over-stocking in 1920. During the six months ending June, 1922, only 189 motor cars were imported, as compared with 333 during the first six months of 1921. Of the latter number 162 were American cars, 86 Canadian, 45 English, 16 Italian, and 12 French, but of the former figure 119 cars were American, 39 English, 18 Italian and 1 Canadian. It is expected that the market for motor

cars will improve early in 1923, as the present stocks have been very nearly all disposed of, and as higher prices for tea and rubber will bring added prosperity to the colony. Ceylon has an excellent system of roads throughout the entire island, and much of the goods and passenger traffic is carried by light lorries. In the first half year of 1921, out of 47 motor car chassis imported 37 were from Canada. These were probably Ford chassis on which motor-bus bodies would be mounted. There is no market in Ceylon for any but light, low-priced motor cars and trucks on short wheel bases.

Canada first in tire trade.—During the first six months of the current year Canada stood first of all countries in the value of pneumatic tires imported into Ceylon. During these six months outer pneumatic tires were imported to the value of Rs. 855,000, of which tires to the value of Rs. 226,000 came from Canada, Rs. 223,000 from the United Kingdom, Rs. 207,000 from France, and Rs. 96,000 from the United States. Canada also obtained a similar proportion of the business in inner tubes and solid tires. This year's splendid record contrasts very favourably with the comparatively small tire trade with Ceylon last year. During the first six months of 1921 rubber tires to the value of Rs. 416,000 were imported, and of this total Canada's share was only Rs. 13,000. During the month of June, 1922, exactly half of the rubber tires imported were Canadian. This is a splendid tribute to the popularity in Ceylon of a certain well-known Canadian-made tire.

Metals, implements and tools.—Ceylon's largest purchase of any one commodity under this heading is for pig lead, all of which comes from Burma. This lead is rolled out into sheets in Ceylon for tea lead. In addition to pig lead, Ceylon imports several thousand hundredweights annually of tea lead from the United Kingdom.

Most of Ceylon's imports of implements and tools are destined for the tea estates and rubber plantations. The total value of this class of goods imported during the first six months of the current year amounted to over Rs. 500,000. The United Kingdom of course gets the lion's share of this business, although the United States is a good second, while Continental Europe's share is infinitesimal. About the only business that Canada has in this class of goods is in disc harrows manufactured by the Massey-Harris Company. As this one Canadian agricultural machine has been successfully introduced in this market, there is no reason why others should not also be successful. Other types of agricultural machinery used considerably in Ceylon include light cultivators for bullock power costing from $20 to $30 retail, cheap and strong villagers' ploughs selling at from $15 to $20 retail, and light sulky ploughs.

Paints and varnishes.—Several American brands of mixed paints are doing well in Ceylon, although the United Kingdom supplies 90 per cent of the demand. Ready mixed paints are sold in assorted colours in 2, 4 and 7-lb. tins and in 14 and 28-lb. kegs. "Pabco," an American paint, is sold generally in one American gallon tins and in 67 and 135-lb. drums. A special red paint for corrugated iron roofs in the tea districts is sold extensively. Owing to the very heavy rains in the tea districts, estate buildings must be painted every season to prevent rapid deterioration. Other varieties of American paints used in Ceylon are liquid floor coverings, varnishes for inside work, and a lacqueret for staining and varnishing, and carriage and motor car paints.

Estate tools.—Two or three British manufacturers do a very large business in such estate tools as axes, catties, digging forks, weeding forks, fork hoes, mamoties, grubbing mattocks, pickaxes, quintannies, weeding scrapers. Neither the United States nor Continental Europe has been able to get any appreciable share of this business. The Ceylon labourer demands a good quality tool, and he is very conservative in that he would not think of using a tool of any design

or colour departing in the smallest degree from the tools to which he had been accustomed. It would be necessary for any Canadian tool manufacturer interested in this market to instruct his representative in the United Kingdom to call on the London buying houses of some of the Colombo estate tool merchants. The chief thing to remember for any Canadian manufacturer interested in this estate tool market is that his product must be as near as possible exactly the same as the English tools now used. The writer was shown a Canadian attempt at a Ceylon digging fork which could not possibly be sold in Ceylon, simply because the prongs of the fork differed very slightly in shape from the English models and were in addition painted a gold colour instead of black. The writer was assured by a Ceylon merchant that if Canadian manufacturers could turn out estate tools exactly like the tools now manufactured for him in England but at a slightly lower price, his buying house in London would try them out.

ESTATE TOOLS AND TEA FACTORY REQUISITES

The following is a general list with some specifications of the various kinds of estate tools and tea factory requisites for which Canadian manufacturers may be able to quote competitive prices:—

Barbed wire, galvanized, 12 gauge 4 pt. barbed 3 in. apart. Best quality, American made.
Belting, rubber, 2½-in. by 4 ply; 3-in. by 4 ply; 4-in. by 4 ply; 5-in. by 5 ply; 5-in. by 6 ply.
Belt fasteners, 4, 6 and 8 ply.
Bolts and nuts, galvanized, ½-in. by ½-in. to 1-in.; ¼-in. by 1¼-in. to 1½-in.
Brushes, British made, scrubbing, stencil, varnish, wire bound, whitewash, tar, horse, etc.
Buckets, enamelled, English-made, with covers, size 11-in.; also in 12-in., 13-in. and 14-in. sizes.
Buckets, galvanized, seamed, size 8-in. to 16-in.; riveted, size 10-in. to 16-in.; corrugated, seamed 12-in. and 14-in.
Expanded metals for concrete reinforcement.
Cement, English and American, for building and tea-firing furnaces.
Galvanized sheets, 12 to 28 gauge.
Hammers, sledge, carpenters'. stone breakers'.
Hoop iron for tea chests, ½-in. by 26 and 30 gauge.
Hose, rubber and canvas, ½-in. to 3-in.
Lamps and lanterns.
Lawn mowers.
Roofing fabrics in rolls.
Nails for tea chests, 1-in. and 1½-in. by 14 gauge, 1½-in. by 13 gauge. Packed in 5-pound packets and boxes of 25 pounds.
Nail pullers.
Piping, galvanized, light and heavy, ½-in. to 2-in.
Pulleys, wrought iron split, all sizes.
Pumps, hand and power.
Rakes, wrought iron, 6 to 18 teeth.
Ranges, cooking, combination for coal, charcoal and wood.
Refrigerators, oak finish, porcelain lined, 24-in. by 17-in. by 51-in.
Saws, cross-cut and pit, English and American.
Brass cocks for water systems.
Screws, brass and iron, countersunk head.
Shovels, steel, for tea bulking, beechwood handles, 18-in. by 14-in.
Staples, for wire netting, galvanized, ⅞-in. and 1-in. by 14 gauge; bright 1¼-in. and 1½-in. by 14 gauge.
Tacks, fine tinned, cut steel, ½-in., ⅝-in. and ¾-in.
Wire netting, galvanized, 1½-in. to 3-in. mesh, width of rolls 1½ to 6 ft; length of rolls, 50 yards; gauge of wire 16 to 19.
Steel shafting and accessories.
Weighing machines, American and English.
Wheel barrows, knocked down.

On application to the Director, Commercial Intelligence Service, Ottawa (quoting file No. T.C.-3-105), interested Canadian manufacturers will be able to obtain a list of the London buying agencies of some of the largest and most reliable importers in Ceylon. These buying agencies fill the indents received weekly or monthly from Colombo, and unless a request for a particular brand accompanies the indent, they make their purchases according to their own discretion. Canadian manufacturers of any of the commodities listed above are strongly urged to get into touch with these London houses.

A WARNING TO CANADIAN EXPORTERS

Canadian exporters should go very slow about entering into business relationships with any Colombo firms whose names are not on the list supplied through the Commercial Intelligence Service of the Department of Trade and Commerce. Several English exporters of piece goods, hardware and tools have lost hundreds of thousands of pounds sterling during 1920-22 through repudiation by bazaar dealers in Colombo. While there are several first-rate bazaar firms in Colombo, who have fully satisfied their obligations, a surprisingly large proportion of native merchants in Colombo managed to wriggle out of meeting their drafts on many large consignments of imported goods. One example which has come to the knowledge of the writer will serve to illustrate how widespread was this repudiation.

A well-known English exporting house, which had conducted for many years a very large trade with Ceylon, found that in the spring of 1922 upwards of £300,000 of their drafts in Ceylon were still unpaid. A thorough investigation was made and the strongest measures were adopted in an endeavour to collect on these drafts. It was found that dozens of native merchants in Ceylon who had received their consignments on a falling market had refused to meet their drafts, although they had later sold these very goods. On being hard pressed for payment these firms went into liquidation and the ownership simply changed from one member of a family to another. In very few cases could the original proprietor be legally prosecuted, although it was well known that he had bought tea estates and rubber plantations on the proceeds of the sales of goods he had not paid for. The writer was shown a list of over a score of these defaulting merchants, each of whom had repudiated contracts worth from £5,000 to £20,000, and none of these could be legally prosecuted. Such merchants pay readily enough on a rising market, but the moment the market goes against them, they are only too fond of repudiation. The next step is then liquidation and the formal transfer of the business to another member of the family, while the original proprietor, although actually still the owner of the business, is found to be working as a "clerk" under a cousin or wife's uncle, who acts purely as a figure-head. It must be remembered that Ceylon is under Roman-Dutch law, which offers many loopholes to unscrupulous merchants who wish to avoid meeting their obligations.

TERMS—CASH AGAINST PRESENTATION OF DOCUMENTS

At the present time business is being conducted in Ceylon largely on a basis of cash against presentation of documents. Sixty or ninety days may be extended to selected firms of proven standing, but in many cases such firms prefer to pay cash when prices are competitive. The average London house indenting for Ceylon usually operates on a cash payment basis. Canadian exporters to Ceylon need not quote any more generous terms than cash against presentation of documents in Ceylon. Care should be taken, however, that the documents do not arrive before the goods.

THE CEYLON CUSTOMS TARIFF

When not otherwise stated, the Ceylon customs tariff is now at the rate of 10 per cent ad valorem. This rate was created in September, 1922, and represents a slight increase over the former general tariff of 7½ per cent ad valorem. Notable exceptions to the 10 per cent rate are as follows: acetic acid, 7½ per cent; agricultural machinery and implements, 2½ per cent; tea shooks, tea lead, hoop iron and other materials for making tea boxes, free; paper, 2½ per cent; piece goods, 5½ per cent; machinery and iron and steel goods, 2½ per cent; motor trucks, 7½ per cent.

SHIPPING

Where consignments are comparatively small, it is the custom of many United States exporters to route their shipments to Ceylon via the United Kingdom. Canadian exporters will probably find that in the end time will be saved by shipping via the United Kingdom, and that the shipment will reach its destination in better condition. General cargo shipped to the Middle and Far East via New York is often subject to a good deal of shifting and mishandling. For these reasons nearly all the American or Canadian-made tires destined for Ceylon are routed via the United Kingdom. It is usually found more economical, however, to ship large and strong packages direct from New York, that is, providing there are no direct Canadian sailings. Pacific Coast shippers, of course, are able to ship direct from Vancouver by two or three lines.

THE SUGAR PRODUCTION AND TRADE OF ITALY

Trade Commissioner W. McL. Clarke

Milan, December 16, 1922.—When at the end of 1921 it was found that Italy had bought abroad during that past calendar year some 96,500 metric tons of sugar or about nineteen times the quantity purchased in 1913 and over eight times the 1920 imports, and that the exports were negligible, the local sugar interests began seriously to take thought of the coming year. A decision between the beetgrowers and the refiners was arrived at last March to increase as far as possible the beet acreage in 1922, with the result that the present crop of 260,000 metric tons of sugar is the largest since the last pre-war year, although it is still about 45,000 tons under the production of 1913. As it is estimated, however, that the national consumption will this year total about 275,000 tons, it is evident that on this basis there must need be imported a minimum of between 10,000 and 15,000 tons even should no exports of sugar leave the country. The purpose of this report therefore is to call attention to the sugar industry and the sugar requirements of this market.

INCREASING ITALIAN PRODUCTION

The cultivation of the sugar beet in Italy this year was carried on over an area of 211,250 acres, as compared with 183,487 acres last year, and as compared with 130,960 acres during the quinquenniad 1909-1913. In fact the acreage under beetroot this current year was the largest on record, and had the yield been as high proportionately as in 1913 the sugar production would have reached 318,000 tons. The pertinent inference, however, is that Italian agriculturists are again turning their attention to beetroot raising, and it is to be expected that an endeavour will be made to intensify production so that the minimum yield will not fall short of from 250,000 to 275,000 tons. Whether Italy will be able to bring increasingly larger areas under beetroot cutivation is a moot question. Wheat growing is more important in Italy's agricultural economy than sugar production, and hence the wheat lands of the country are not apt to be converted into sugar-yielding areas. Apart from the fertile plains of northern and eastern Italy, the land suitable for beetroot is strikingly limited, and it is doubtful if Italy can at best under present conditions supply the minimum local requirements of the country.

SUGAR CONSUMPTION INCREASING

There is evidence, moreover, that these minimum needs are continually on the increase. Quite apart from the imports of 1921—which year witnessed

an unusually large amount of foreign sugar purchasing on account of depleted stocks and the attractiveness of overseas prices—the consumption of sugar in Italy is decidedly on the incline. For this upward trend various contributing factors are responsible, among which may be mentioned: (1) the rapidly growing population; (2) the change of the scale of living during and since the war, which has brought a demand for sugar from classes previously unaccustomed to its habitual use, so that the annual per capita consumption is now estimated at 16 pounds as against 10 pounds in 1913; and (3) the growth of the sugar-using industries, e.g. the manufacture of tinned fruits, jams and confectionery. The old-established factories devoted to the preserving of fruits in sugar and syrups—to take one specific example—are expanding and new plants are being laid down. As Italy is so markedly a fruit country, the possibilities of development in this direction are very appreciable. Another outlet which calls for a very large and increasing consumption of sugar is what may be termed the "cafe industry." In every important and often side street of every big and small town are found one or more cafés where Italians drop in at all times of the day for a cup of sweetened black coffee. This coffee with natively produced wine divides the honours of being the national drink of the country. Hence a very large amount of sugar is used in this way, and the popularity of these cafés has noticeably increased during the writer's five years' sojourn in this country. Enough has been written therefore to indicate that the tendency in Italy is to consume more rather than less sugar and that the maximum needs of to-day will but probably be the minimum wants of to-morrow.

CANADIAN SUGAR IN ITALY

It is this increasing sugar consumption which deserves the attention of Canadian refiners, especially as during this present year there have been upwards of 1,500 tons of Canadian sugar sold in Italy. The writer understands that this shipment was well received on this market, and was spoken of even more highly than the American granulated on account of the fineness of the grain. This Canadian sugar was largely used by a large chocolate manufacturer, and as this and similar industries are very important, it would seem that Canadian exporters, other things being equal, would have an advantage when Italy is in the buying market. Even though this year the crop is not far short of what must be considered the 1922-23 requirements, yet an effort should be made to keep in touch with buyers and to hold what ground has been won. It may not be possible this coming season in Italy to move forward our stakes appreciably, but it is possible to watch supply and demand and should the occasion offer to block out to a larger extent other foreign competition.

THE CLAIM OF ITALIAN MARKET ON CANADIAN EXPORTERS

From the foregoing it will be evident that sugar production, consumption and imports have all been rising during the past year, but that consumption is outrunning production, and that even in this year of relative plenty at least 10,000 metric tons will most probably have to be imported. We have further noted that Canadian sugar has been most favourably received on this market, and that in the margin lying between consumption and national output there is room for Canadian trade, and that this margin at ruling market prices will absorb at least $3,000,000 worth of sugar during 1922-23. There is the probability, moreover, that the rapidly growing consumption and the present restricted area available for beetroot cultivating will continue to widen this margin in ensuing years. Hence the claim of this market on our sugar exporters.

KIND OF SUGAR REQUIRED IN ITALY

The different types of sugar prevailing on this market may be best summarized as follows: (1) lump sugar in bulk; (2) granulated; (3) pulverized; (4) loaf sugar; (5) brown sugar; and (6) grey sugar.

(1) *Lump sugar (pilé) in bulk* comes in two different qualities: (1) white and (2) extra white. This sugar sells in irregular lumps from the size of a marble to that of an egg and is always accompanied by a certain amount of powder resulting from the breaking off of pieces. This type of sugar is used largely for cooking purposes, to some extent for industrial uses, and also among indiscriminating householders for serving on the table. The present wholesale price on the Milan market for white or second quality is 605 lire per bag of 100 kilos and for extra white or first quality 609 lire.

(2) *Granulated sugar.*—This type of sugar is practically the same as our granulated sugar at home and is known here under the name of *semolato* No. 1 and No. 2. Granulated No. 1 is not so fine as granulated No. 2, which latter corresponds pretty much to our best granulated table sugar at home. The present wholesale price is for No. 1 some 609 lire in bags of 100 kilos, and for No. 2 some 611 lire per 100 kilos. This sugar is also packed in 1-kilo. cartons, 50 cartons to a wooden case, and when thus packed now wholesales at 625 lire per 100 kilos.

Another type of granulated sugar used to some large extent here by the pastry shops is what is known as "granulato," which consists of a much larger grain ranging in size from a canary seed to a small shaped pea. This sugar is sprinkled on a type of cake very popular throughout the whole of Italy. It wholesales now at 611 lire per bag of 100 kilos.

(3) *Pulverized sugar.*—This variety of sugar is used largely by the pastry shops, which employ it for icings or for dusting on the tops of unfrosted cakes. This wholesales either in bags of 100 kilos at 611 lire or in 1-kilo. paper cartons, 50 cartons to a wooden case, at 630 lire.

(4) *Loaf sugar.*—Although used to some appreciable extent in Italy prior to 1913, the war, the writer understands, did much to popularize the use of loaf sugar in Italy. This was due to the fact that the saccharine squares and cubes were found at least clean and convenient, even if not agreeable to the taste, with the result that the loaf form of sugar is now called for continually and in many homes is preferred for table use. The greatest demand for loaf sugar, however, comes from the bars and cafés all over Italy, where coffee is almost invariably sweetened by the square and cubed sugar.

This sugar comes in three grades: (1) the large regular cube about $1\frac{1}{4}$ inch by 1 inch by $\frac{1}{4}$ inch, used mostly in private families and in the *de luxe* restaurants and hotels; (2) the smaller cube, about $\frac{5}{8}$ inch by $\frac{5}{8}$ inch by $\frac{1}{8}$ inch, used in other hotels and by private families; and (3) the still smaller cube, often as a matter of fact broken, about $\frac{3}{4}$ inch by $\frac{3}{4}$ inch by $\frac{1}{8}$ inch, used in the majority of the bars and the second-grade hotels. In pre-war days there was also available highly crystallized cubed sugar, almost transparent, which was served in many private homes. This is not now on the market.

These various types of loaf sugar are now wholesaling at 630 lire in bags of 100 kilos, or in 1-kilo. cartons, 50 cartons to a wooden case, or at 636 lire per 100 kilos if packed in small cases of 25 kilos.

(5) *Brown sugar.*—There is no very important demand for brown sugar, used mostly locally for cooking purposes. It wholesales at 560 lire in bags of 100 kilos.

(6) Another kind of sugar used to some appreciable extent by chocolate and candy manufacturers is what is known here as "grey sugar." It is an

inferior variety of granulated sugar and lacks, the writer understands, both the sweetness and the whiteness common to first-class granulated. It wholesales at 573 lire in bags of 100 kilos.

To sum up, then, it may be stated that for industrial and cooking purposes the *pilé* variety of sugar is most common, while for table use both the granulated and cube sugar meet with favour, granulated outselling loaf sugar for private consumption and the cube sugar outselling granulated in hotels, cafés and restaurants. Relatively very little pulverized and brown sugar is used on this market.

HIGH COST OF SUGAR IN ITALY

It will be clear, on an examination of the foregoing prices, that sugar is extremely dear on this market, but despite what might be termed as its luxury price, it sells in ever-increasing quantities. The Italian pays his grocer about 16½ cents per pound for sugar at present exchange, though to him 16½ cents represents about four times that amount or say 66 cents. The Canadian housewife complained when during the war years sugar soared over the 10 cents mark, but the Italian is, four years after the war, paying more than eight times what the Canadian is now asked to pay.

The high cost of sugar in Italy is due largely to indirect taxation, as the Italian manufacturer has to pay a manufacturer's tax and surtax to the Government of some 216.15 lire per 100 kilos of sugar produced, and naturally the manufacturer passes on this tax to the individual consumer. Were there no tariff walls in Italy, still foreign-made sugar on entering the country would have to pay a sum equivalent to this manufacturer's tax, but over and above this internal levy which hits both national and foreign sugars there is the manufacturer's protection of 30.60 gild lire per 100 kilos, which now works out at about 125 paper lire per 100 kilos or i.e. at present exchange between 2½ and 3 cents per pound. Thus Canadian sugar for arrival at Genoa pays the manufacturer's tax or about 5½ cents per pound plus the customs duties of 2½ cents per pound, or that is what amounts to an eight cents a pound rate of taxation. To put it another way, there is more duty levied on foreign sugar on being imported into Italy than is the actual retail cost of sugar to the purchaser at home. Little wonder then that sugar is expensive in Italy.

PACKING AND TERMS OF PAYMENT

The most acceptable method of packing granulated sugar for this market is in cotton or linen bags of 100 kilos over which is placed a jute bag for protection purposes. The loaf sugar should preferably be packed in 1-kilo. cartons, 25 or 50 cartons to a wooden case. Cubed sugar of the smaller and less choice variety is also handled in 100-kilo. bags as just described.

The usual terms of payment among importers of sugar on this market are cash against acceptance of documents.

THE ITALIAN SUGAR INDUSTRY

With the foregoing data before us it will be more opportune to glance briefly at the Italian sugar industry itself, and to refer in greater detail to Italy's imports and exports of sugar.

In Italy there are altogether some thirty-eight plants producing beetroot sugar, which were they to work at capacity could turn out 300,000 tons of sugar per year. In addition there exist nine refineries, of which seven are attached to the sugar establishments, capable of producing 1,200 tons of refined sugar daily. To reach these outputs, however, it is estimated that it would be necessary to cultivate annually some 250,000 acres, which area, as is evident from a preceding

paragraph, is some 40,000 acres more than that sown in sugar beet during 1922 or the year of most extended planting. It is unlikely therefore that new sugar-producing machinery on any important scale will be installed during the next few years, unless old machines should be discarded. The sugar industry of Italy employs continuously about 5,000 operators, while during the sixty to eighty days of seasonal beet crushing some 15,000 hands are temporarily taken on. The wages in the beetroot factories reached their peak in 1921, but since then a recession has been in evidence. Over against the 3 lire a day, however, which was paid unskilled labour in these factories before the war, the present wage scale gives these seasonal operators 15 to 20 lire per day. It is estimated that about 100,000,000 lire are paid annually in wages in the sugar industry. The total capital invested in this Italian industry amounts to about 375,000,000 lire.

EXPORTS OF ITALIAN SUGAR

A question frequently discussed in agricultural and other economic quarters is whether Italy is to become an exporter of sugar to any appreciable extent. *Prima facie* evidence would at once answer in the affirmative, as the country's producing capacity is at present very appreciable over normal requirements, and as moreover it is argued that beetroot cultivation can be extended and even more plant laid down. A closer examination would show, however, as has been previously pointed out, that the check on greater sugar production is the availability of suitable land, and it is hardly likely wheat growing will be sacrificed to beetroot planting. In time more "extra" land may be rendered adaptable for the cultivation of the sugar beet, but at present the prospects are not bright in this connection. An additional consideration is the fact that Italy's own population is increasing concurrently with an augmented sugar consumption, while what is more, the country up to date has not over any stretch of years been an exporter of sugar. The year 1913-14 was exceptional both for the area sown in beets and for the unique outturn of sugar itself, when some 305,000 tons were manufactured, and yet in that year less than 30,000 tons were exported. The following year, with the war in full course, sugar became increasingly scarce on the world markets, and Italy took advantage of the high prices prevailing to curtail internal consumption and to export some 50,000 tons, even though the national yield that year was less than half the production in 1913-14. In 1913, however, the last normal year before the war, Italy only exported some 1,030 tons of sugar, while the average exports of sugar from 1916 to 1921 amounted to less than 800 tons per annum, the exports for 1920 and 1921 being 27 and 8 tons respectively. The evidence available therefore would indicate that at present Italy is exporting only a fractional quantity of what she did before the war, and now with more and sweeter mouths to feed it is unlikely that within the next few years Italian sugar exports will sum up to a large total.

ITALIAN IMPORTS OF SUGAR

Leaving out of account the war years' imports of sugar, we find that Italy imported some 7,000 tons in 1913, 75 per cent of which came forward from Austria and 20 per cent from France. In 1919, on the other hand, 79,481 tons of sugar were imported, 75 per cent of which was derived from the United States, with small contributions from especially the Dutch East Indies and Brazil; in 1920 some 11,376 tons were imported, with the United States supplying 63 per cent and France and the Dutch East Indies the next most important sources of origin, and in 1921 some 96,620 tons were imported, 60 per cent of which was shipped from the Dutch East Indies and 20 per cent from the United States. During the first three months of 1922—the period for which the latest Government statistics are available—Italy imported some 11,446 tons, of which the United

States supplied 35 per cent, Dutch East Indies 30 per cent, Brazil 20 per cent. and Czecho-Slovakia 10 per cent. It is worth noting therefore that, though before the war the United States did not figure prominently in Italian sugar imports, yet latterly her percentage of contribution has not been insignificant. What is more interesting to Canadian exporters, however, is that during the current year, as has been already intimated, Canadian sugar on a small scale has come in on this market.

SUMMARY

To sum up then, it is to be understood: (1) that Italy will endeavour to push forward her sugar production as much as practicable; (2) that though this production is capable of supplying the minimum needs of the country, yet actually it is to be expected that the crop this year will be found to have run out by July, and that from then to September, when the next year's crop is available, foreign sugar to the amount of some 10,000 to 15,000 tons will at least be required to fill up the margin between minimum and maximum consumption; (3) that the maximum requirements of this coming year will most probably become the minimum requirements of ensuing years; and (4) that Canadian sugar has met with acceptance on this market, and that the success obtained by Canadian sugar this year should not be rendered nugatory by inattention in the future on the part of Canadian refiners.

THE SUGAR SITUATION IN MANCHESTER

Trade Commissioner J. E. Ray

Manchester, Dec. 23, 1922.—Several sugar importers in Manchester have just been interviewed on the sugar situation, more especially in relation to the prospect of Canadian refiners procuring a market in this district for their surplus production next spring.

It must be confessed that opinions differ regarding the future demand and its relationship to supplies from whatever source they may be derived. Some importers contend that if the Canadian refiners can quote attractive prices, there need be no fear that the prophecies in some quarters regarding a probable falling-off in demand will stand as an impediment to business. It is quite true that consumption in the United Kingdom is much below the pre-war level. One authority states that it is now about 71 pounds per capita compared with 86 pounds per capita in 1913. The rationing during the war period doubtless taught economy, but far more important factors contributing to the decreased consumption are the higher sugar duties now existing, and the general trade depression which naturally operates adversely on the demand for all kinds of commodities. Further, there is a belief that "invisible" stocks are exceptionally large, due to the non-usage during the general trade slump of supplies purchased by confectioners, etc. These supplies, it is affirmed, must be used up before the confectionery manufacturers begin to purchase again.

One or two importers are under the impression that prices will fall in the spring owing to the lack of adequate purchasing power of certain European countries; others anticipate an advance in price, basing their reason for it upon the probability of a world sugar-shortage in 1923 of approximately one million tons compared with 1922.

Under the circumstances it is impossible at this juncture to transmit any thoroughly reliable data to work upon regarding the prospect Canadian refiners will have in the spring of finding a market in Manchester and district. The only course they can follow is to keep in constant touch with the importers themselves—(their names are on file at the Department of Trade and Commerce, Ottawa)—and submit their quotations for consideration from time to time.

AUSTRALIAN FINANCIAL CONDITIONS

Trade Commissioner D. H. Ross

Melbourne, December 13, 1922.—The approach of the general elections—on December 16—has had an unsettling effect upon business this month, and apart from the regular Christmas trade, which has kept both wholesale distributors and retailers fully engaged, there has been no development of commercial importance to report.

Included in the favourable trading features are the satisfactory manner in which the wool sales have been proceeding since the opening of this season. Merino wool has substantially increased in value, and—in comparison with last season—there has been a decided improvement in the demand for crossbred wool.

Imports into Australia for the four months ended in October were valued at £42,271,941, as compared with £27,932,005 for the similar period of the previous year. Exports for the four months ended in October were £32,505,020, as compared with £35,334,279 in the previous period.

Harvesting is proceeding apace, but the crops are moderate and prices are likely to firm, especially in oats and hay, and probably in barley also. The dry spring months have detrimentally affected the oat crop and very little oaten hay will be available as the growth was stunted, and it is possible that some oats will be imported shortly if the landed cost is not excessive. High prices are expected to rule on hay and chaff.

The wheat market is steady with a slight upward tendency. Operators are offering 5s. 2d ($1.26) at the seaboard, which is equal to about 4s. 8d. to 4s. 10. ($1.14 to $1.18) at farmers' loading stations.

Flour is firm for prompt delivery, and millers have practically sold up to the full capacity of their mills until well on in January, hence the quantity now available for export in January is almost negligible. The nominal price ruling to-day is £10 15s. ($52.32) per ton of 2,000 pounds, packed in 100-pound bags, free on board steamer.

In iron and steel products some considerable business has been done, at finely cut prices, during the last few weeks. Within the last few days, on expert and reliable authority, United States steel plants are quoting lower landed prices than either British or Canadian. As in other lines, little business is likely to be placed until after the first week in January.

GOODS SENT TO ARGENTINA BY LETTER POST

The attention of the British Board of Trade has been called to a recent case in which a fine, equal to twice the amount of the customs duty leviable, was imposed by the Argentine authorities in respect of certain goods sent to Argentina by registered letter post.

H.M. Minister at Buenos Aires points out in this connection that the Argentine customs regulations strictly forbid the despatch to Argentina of goods liable to import duty by registered letter post, except on compliance with the prescribed formalities. Goods forwarded in this manner are liable to be confiscated or are subject to a double duty, except in cases where previous notice has been given to the Argentine customs authorities stating that certain goods (as described) are arriving by registered post by a certain steamer, or the approximate date when the goods are expected to arrive, and requesting the customs authorities to fix the amount of duty to be paid.

THE BUSINESS OUTLOOK IN THE UNITED STATES

Frederic Hudd, Trade Commissioner in the United States

New York City, January 11, 1923.—With the opening of the present year industries in all sections of the country make favourable reports, and in a statistical review of the year 1922, the United States Department of Commerce expresses the opinion that business will improve during 1923 and substantially increase the 50 per cent advance made by manufacturing industries as compared with 1921. The review points out that practically every branch of economic activity in the United States is now in a better position than a year ago. Continuance of the improvement in business which took place in 1922 is therefore predicted. The retarding effect of the strikes has been overcome, and in this connection it has been noted that in 1922 labour troubles of the most severe character were experienced, but that in spite of them there was a rapid transition from reduced output and general unemployment to a genuine labour shortage. In 1921 one of the most important factors in the improvement of business conditions was the rise in the price of agricultural products, which has tended to restore the balance between the prices of agricultural products and the products of other industries. The final estimate of the Department of Agriculture of the 1922 crop puts them at $1,800,000,000 above the value of these crops for the year 1921. This would indicate an increased purchasing power of which other industries will ultimately feel the benefit.

The Department of Commerce in its review says:—

> It is with a feeling of satisfaction that most industries can view the progress of the past year in spite of the many difficulties which have been experienced. At the close of 1922 there are no serious obstacles in sight which should hinder further advances during the early part of the new year. The unsettled conditions in foreign countries, particularly in Europe, are still depressing our trade and to a certain extent have, no doubt, kept the prices of agricultural products below the level of other commodities. Within the past two months this latter condition has, in a measure, been relieved.

INCREASED PRODUCTION

Production of manufactured commodities in 1922 was about 50 per cent greater than in 1921, according to figures compiled by the Department of Commerce from latest reports to the Bureau of Census made in connection with the survey of current business. Textile mills were about 20 per cent more active than in 1921, the iron and steel industry increased its output from 60 to 70 per cent over 1921, non-ferrous metals from 50 to 95 per cent, petroleum 15 per cent, coke 40 per cent, paper 20 to 30 per cent, rubber 40 per cent, automobiles 50 per cent, building construction 50 per cent, cement 15 per cent, leather 20 per cent, sugar 45 per cent, and meats 5 per cent. Agricultural receipts were in general higher than in 1921. The only declines of outstanding importance were 7 per cent in bituminous coal and 47 per cent in anthracites.

The increase in production and the reduction in immigration improved the labour situation from a large surplus of labour at the end of 1921 to a point where shortages occur, while unemployment has almost been eliminated. Transportation conditions changed from a huge surplus of idle freight cars to a considerable shortage, while car loadings were 11 per cent greater than in 1921.

Prices to the farmer increased about 17 per cent during the year, wholesale prices advanced 10 per cent, and retail food prices declined 5 per cent. This condition gives the farmer a greater purchasing power and narrows the margin between wholesaler and retailer.

The volume of trade was considerably heavier than in 1921. Sales of mail order houses increased 6 per cent and chain stores show a gain of 13 per cent. Debts and bank clearings also show about this same relation.

The housing shortage continues in spite of a large volume of building carried out in 1922, which was 50 per cent in excess of the construction contracted for in 1921. This increased activity benefited a great number of industries. The very large output of automobiles and the revival in the textile

industries, as well as a marked expansion of production in other lines, reflected the buying power of the country and its capacity for consumption. The expansion in the various lines could also be noted in the greatly increased volume of railway traffic.

BUSINESS FAILURES

Business failures in the United States in 1922 were the most numerous in the history of the country, according to Bradstreet's. The liabilities were the second largest on record. Suspension of mercantile firms numbered 22,400, an increase of 11·9 per cent over 1921, and an increase of 164 per cent over 1920. Liabilities aggregated $646,955,633, or 14 per cent less than in 1921, but 51 per cent in excess of 1920. Assets of the suspended firms last year totalled $364,602,438, or only 56·3 per cent of liabilities.

THE OUTLOOK FOR THE FUTURE

The factors upon which an optimistic opinion of the future may be based are: the improved transportation situation with the concurrent freer movement of commodities; the increased supply of fuel for industrial purposes; the increase in the price of farm products; and the prospect that the United States may participate in some endeavour to deal with European financial problems. As the business of the United States with Europe is of vital concern to domestic business and present European demands are very uncertain, business progress in the present year will be dependent to a considerable degree upon developments in Europe. In addition to the European situation and Europe's consequent lack of buying power, other unfavourable factors to be considered in estimating the present business outlook are the continued tendency of prices to rise and living costs to increase.

THE IRON AND STEEL INDUSTRY

The iron and steel industry of the country started the new year with increased production and an expansion in demand on the part of new consumers. This is in direct contrast to the situation which faced the various steel companies a year ago, when the industry was depressed as a result of the deflation in prices and slump in demand which started in the autumn of 1920. Leading steel companies in the Pittsburgh and Chicago districts, according to trade reports, have assurances of activity on a large scale for at least the first quarter of this year, and it is believed that the momentum will carry them further. The *Iron Trade Review* says:—

In 1922, the iron and steel industry turned back along the road to prosperity after the drastic readjustments of 1921. Measured by tonnage and marketed, considerable progress was achieved and processes of normal development in industry which were violently interrupted by a general economic upheaval were resumed. Good business, however, with its complement of substantial addition to surplus after liberal allowances for depreciation, renewals and reserves, was not attained. In its financial aspect, the year was decidedly unsatisfactory. With some exceptions, the majority of the iron and steel companies were unable to make much of a showing from the year's operations. This situation may be attributed in a large part to factors outside the iron and steel industry, no one being more chargeable for the troubles of the iron and steel manufacturers in 1922 than the coal strike and its attendant effects.

THE MONEY MARKET

Improved conditions in the bond market and natural acceleration after the holiday season resulted in the floating of many new securities during the first week of 1923. The manner in which they were taken by investors indicated a large demand. The relaxation in money rates since the first of the year has been an important factor too, and old bonds on the Stock Exchange have recorded gains averaging 1 per cent since the "turn of the year." The bulk of sales are being made directly to investors.

THE IMPORT TRADE OF CHILE

Trade Commissioner B. S. Webb

[*This is the second of a series of reports on the Markets of Chile. The first, which dealt with textiles, agricultural machinery and implements, and iron and steel products, was published in the last issue (No. 989).*]

TRANSPORTATION MATERIAL

Transportation material was imported into Chile during 1920 on a smaller scale than usual, the value under this head amounting to $2,860,000 Canadian, made up as follows: locomotives, $872,000; rails, $514,500; fish-plates, $240,000; car wheels, $233,500; freight cars, $219,600; Decauville, $156,300; rail spikes, $105,300; track bolts, $70,000. Imports from the United States were valued at $1,781,300; from Great Britain at $678,666, from Germany at $260,000, and from Belgium at $68,600. The Chilian Government is the largest importer of railway material, and the present condition of the state lines combined with the Government railway development policy indicate a continued heavy demand for railway material. Full and complete specifications for the material required by the State Railways is on file at the Department of Trade and Commerce, Ottawa, where they can be consulted by interested parties, and information on the subject of tendering is contained in a subsequent paragraph of this report entitled "Tendering for Government Supplies." The State Railway administration is now encouraging the local manufacture of rolling stock, but as the cars are made up almost entirely from imported parts and materials, the manufacturing process is reduced to one of assembling; locally-made cars do not equal the imported in point of finish. The importation of railway material and equipment during 1915 was valued at $1,699,590 Canadian; in 1919 at $4,142,450; and in 1920 at $2,866,367.

Car wheels, fish-plates, spikes and rails.—Full specifications of the State Railway requirements in car wheels, fish-plates, rails and rail spikes are in the files of the Department of Trade and Commerce, the imports of this material during 1920 having been as follows: car wheels, 614 tons from the United States, 292 from Great Britain, 168 from Germany; total, 1,074 tons. Fish-plates: 1,011 tons from the United States, 446 tons from Germany, 91 tons from Belgium, and 44 tons from the United Kingdom; total 1,592 tons. Rails: 5,941 tons from the United States, 509 tons from the United Kingdom, 338 tons from Germany; total, 6,889 tons. Rail spikes: 181 tons from the United States, 82 tons from Belgium, 240 tons from the United Kingdom, 18 tons from Holland; total, 523 tons.

Locomotives.—A number of Canadian-made "Mikado" type of locomotives are running on the State lines and are giving every satisfaction. Locomotives were imported during the year to the value of $900,000, the United States being indicated as the country of origin.

Automobiles.—American cars dominate the Chilian market to the almost entire exclusion of European cars. Fords and similar cars are being largely used in the country districts, whilst higher grade cars such as the Hudson, Packard, etc., are in use in the cities. Automobiles to the value of over $1,000,000 were imported during 1920, nine-tenths of which were of American make. The importation of cars commenced in 1909, when 17 were imported, and in 1917 the figure rose to 3,227. Since then a heavy falling off has been

reported, 1921 being the worst year experienced by the automobile trade since 1911. Importation during recent years is as follows: 1914, 607 cars; 1915, 469; 1916, 1,683; 1917, 3,227; 1918, 2,235; 1919, 580; 1920, 658; 1921, 257 cars.

Motor trucks are gradually coming into use in Chile, importations for the year 1920 having been valued at $240,000. American trucks predominate, the English trucks being considered too good and too heavy for the roads. The light and roughly-finished American truck is considered quite good enough for local conditions. Only the chassis are imported, the truck bodies being made locally. In the town of Valparaiso a large number of motor buses are running in competition with the street cars; they are usually locally-made bodies mounted on Ford or similar chassis.

Bicycles.—Very few bicycles are in use in Chile, the roads, both in the towns and in the country districts, being too rough to permit of their utilization to anything but a limited extent. Imports during the year were valued at $75,000, of which $25,000 is credited to the United States, $21,000 to France, and $14,000 to the United Kingdom.

INDUSTRIAL MACHINERY AND SUPPLIES, TOOLS AND HARDWARE, ETC.

In the nitrate plants engines and boilers are used for raising steam for the boiling tanks, pumps of all kinds for filling and emptying the tanks, perforating machines, drills and explosives for extracting the earth. Steam and machinery accessories of every kind have also to be imported for the local manufacturing industries, and the Republic will always be a substantial purchaser of industrial machinery and supplies. The importation of the articles included under this heading during 1920 was as follows: Machinery, not specified, 3,847 tons; woodworking machinery, 181 tons; cranes, 647 tons; cranes, hand, 86 tons; tools, carpenters and masons, 33 tons; tools, tinsmithing, 77 tons; tools, artisans, not specified, 260 tons; files, 76 tons; sewing machines, 390 tons; refrigerating machinery, 79 tons; shoe-making machinery, 101 tons; paper-making machinery, 43 tons; printing machinery, 150 tons; laundry machinery, 66 tons; milling machinery, 148 tons; sugar refining machinery, 109 tons; weaving (textile) machinery, 108 tons; hammers, 53 tons; saws, 39 tons, and lathes, 126 tons.

Machinery and supplies (not specified) were imported into Chile to the value of $3,847,000 in 1920, of which $1,701,000 is credited to the United States. Great Britain and Germany sold goods to the value of $976,000 and $862,000, respectively.

Chains, iron and steel.—Chains are imported on a small scale for general purposes and for the supply of shipping. Total imports in 1920 amounted to 261 tons, 181 of which were supplied by the United Kingdom, 67 tons by the United States, and Germany and Sweden the balance.

Machinery (woodworking).—This line is being imported in fairly large quantities from the United States. It is expected that the exploitation of the huge forest reserves in the south will maintain the demand for heavy logging machinery and that later there will be a larger demand for portable mills. Of the $248,000 worth of woodworking machinery imported during 1920, $201,000 came from the United States, $25,000 from Great Britain, and $22,000 from Germany.

Steel wheelbarrows.—Steel wheelbarrows are extensively used in connection with the nitrate and copper mining industries and in railway construction, but as they are now being made locally importations are not likely to increase. A certain number of wooden barrows are imported, but steel are preferred. Fifty tons from the United States and 16 tons from the United Kingdom were imported during 1920.

Wire rope.—Wire rope in sizes from ⅜-inch up to 1-inch is imported in fairly large quantites for use in the industries, the mines, for elevators, for commercial shipping and the navy. Such well-known English makers as Rylands, Limited, Bullivant, Armstrong-Whitworth, Newells, etc., are represented in Chile and secure the bulk of the business. In 1920, 766 tons were imported, of which 460 were from the United Kingdom, 191 tons from the United States, and 110 tons from Germany. A new company has recently been formed in Santiago with a large capital for the making of wire rope, and it is expected that this company, when in working order, will be able to supply the market with practically all its requirements.

Boilers and engines.—Importations of boilers in 1920 were valued as follows: Great Britain, $141,958; United States, $69,039; Germany, $2,218; and France, $1,053. Importation of engines: United States, $170,726; Great Britain, $131,857; Germany, $64,041; France, $5,820; Belgium, $5,562, and Sweden, $4,872.

The Republic imported during the year over half a million dollars' worth of boilers and engines from the United States and England in almost equal quantities. Scotch and Lancashire boilers are used for heating water in the nitrate plants; Bellis and Morcom are in fairly general use in Chile, but German-made Diesel engines are now coming in as against steam, and English makers are also offering Diesel engines of English make and German design. Fire engines are included in this classification; and in this connection it is interesting to note that one of the fire brigades in the city of Santiago possesses a couple of Canadian-made fire engines, of which the officers and men of the corps are particularly proud. It appears that these engines are older and have been longer in use than the engines belonging to other corps in the city, and that they are giving better service than the newer and more modern engines of English, French and German make. It should be explained that the fire-fighting forces of Santiago consist of a number of corps of volunteers usually formed by nationalities. For example, there is the English corps, the Spanish corps, the French corps, etc., and each corps, naturally enough, prefers to purchase engines and supplies made in its home country. There is of course considerable rivalry between the corps and much attention is focussed on the efficiency of their engines. Under these circumstances it is a matter for congratulation that in Santiago two Canadian engines are standing up to long service and are giving conspicuously good service in comparison with newer and more modern engines made in other countries.

Saws.—Importations of saws in Chile in 1920 were valued at $53,617, of which the United States is credited with $43,700; United Kingdom, $4,800; and Germany, $4,600.

It is estimated that in Chile there are more than 1,000 Canadian and North American portable mills. United States manufacturers are supplying the larger part of the importation of mill saws and also predominate in hand saws. Germany is supplying fairly large quantities of hand saws of inferior quality. There is a big demand for cross-cut saws for use in the southern forest districts, and a popular type is a one-man cross-cut saw for cutting firewood. Buck saws 13 inches in length are sold very cheaply, American makes predominating. The trade in mechanics' ball is shared by British manufacturers and the Alsatian makers. Fret saws are sold in German-French models with interchangeable blades, Goldenberg and Peugeot Frères makes being most popular. Pruning saws with a curved blade and rough wooden handle are sold by German makers at almost incredibly low prices.

Axes and hatchets.—For domestic purposes, the shingling hatchet is most generally used. Amongst the makes in the hardware stores Peter Ludwig Smidt was prominent amongst the German makes; Spear and Jackson, and

William Edwards & Sons amongst the English, whilst all the well-known American makes and types were seen on sale. Amongst the felling axes the 5½-lb. weight is the largest seller. Claw hatchets are sold for domestic purposes.

Enamelled ware.—This was formerly imported on a large scale from Austria and Germany to the almost entire exclusion of American and English ware. German packing was exceptionally good, and the granite, brown, and blue with white edges, were very popular. During the war a large factory was opened in Santiago which at present is supplying the market, the only competing line being the cheap and exceptionally inferior article brought in from Germany after the war, stocks of which still remain on hand.

Hammers come mostly from the United Kingdom, although amongst hammers with handles American makes predominate. There are five hundred blacksmiths' shops in Chile, and there is a fair demand for farriers' hammers in 10-oz. weights, which demand is supplied from Europe. The ball-pane hammer for mechanics, 20 to 24-oz. weight, of English and American make, is one of the largest sellers. Tack hammers and shoemakers' hammers come from Germany. Of the 50 tons of hammers imported during 1920, 36 tons came from the United Kingdom, 10 tons from the United States, and 4 from Sweden and Germany.

Pipe wrenches.—British manufacturers supply the market with the bulk of its requirements in pipe wrenches, although the hardware trade, while liking British qualities, undoubtedly prefers American patterns. One hardware man summed up the merits of the respective types in the following words: " German for price, American for utility, and British for quality." Imports from the United Kingdom during 1920 amounted to 92 tons as compared with 67 tons from the United States, German and Dutch manufacturers having supplied 12 tons of the total importation of 171 tons.

Tools.—Importations of tinsmiths' and blacksmiths' tools in 1920 were valued as follows: United States, $35,300; Germany, $18,200; United Kingdom, $14,100; total, $67,600. Masons' and carpenters', total $26,150, the United States having supplied to the value of $12,500; the United Kingdom, $6,500; Germany, $3,800; and Sweden, $3,350. Tools, various, were imported into Chile to the value of $112,000 from the United States, $51,600 from Germany, and $51,000 from the United Kingdom; total, $214,600.

Locks.—Originally the market was almost entirely supplied with locks of French pattern, though not always of French manufacture, imitations having been shipped in large quantities from Barcelona. To-day, however, the Yale, Sargent, and similar makes of American locks are being sold almost to the entire exclusion of those from other countries. Out of a total of 8,289 kg., 6,297 come from the United States, 1,151 from France, and 841 from the United Kingdom.

Padlocks.—There is a large demand in all sections of the Republic for padlocks of every kind, the chief requirements being cheapness rather than quality. Of the total imports, Germany supplies over 40 per cent., the United States over 30 per cent, Spain 15 per cent, and the United Kingdom 9 per cent. In the common qualities of padlock, it is difficult for any other country to compete with Germany, and as an instance of the prices at which she has been selling these goods, it may be mentioned that a cheap natural steel or japanned padlock was recently being sold c.i.f. at a price equal to 25 cents Canadian currency per dozen. The best qualities come from France, England, and the United States, and it is recognized that for the higher grades Germany cannot compete. The total imports for the year were 151,498 kilos.

Nails and tacks.—In spite of the fact that there are eight factories in the Republic producing nails and tacks, the imports for the year amounted to 2,893,454 kg., of which 80 per cent came from the United States, 14 per cent from the United Kingdom, and the balance from Sweden and Germany. The local product is of an inferior quality, and so far the competition has not been seriously felt by the exporting countries. Horse shoe nails, for which there is a considerable demand, formerly came from Germany, but her prior position has now been usurped by Sweden, which supplies practically the entire demand of the Republic for this class of goods.

Screws, bolts and nuts.—Bolts and nuts are imported in double bags of 46 kg. (100 pounds) each in all threads and sizes. Messrs. Guest, Keen and Nettlefold are now making machine nuts and bolts in Chile, but not wood screws; American screws are very inferior as a rule, the slot not being deep enough and the thread too shallow; for this reason European, and especially British, screws are preferred. With regard to the type of thread, Whitworth standards are usually adhered to, and the demand for other standards is small. Machine bolts for ironwork, $\frac{3}{8}$-inch to 1-inch, are in large demand by the State railways, and there is a small factory for the manufacture of these at Valparaiso. Carriage bolts come from the United States. Of the 1,296 tons of bolts, nuts and screws imported during 1920, 654 tons came from the United Kingdom, 589 tons from the United States, and 53 tons from Germany.

Hinges, iron.—The following shows the imports for 1920: United States, 66 tons; Germany, 16 tons; United Kingdom, 8 tons; Sweden, 6 tons; total importations, 98 tons.

A popular type of hinge, produced in the United States and not supplied by English and German houses, is a 3-inch and 4-inch steel butt hinge, with a movable spindle. A number of high ornamental cast-iron butt hinges of all Spanish patterns are imported; the plain English patterns are not acceptable locally.

Files.—There is a keen competition for the business in files, although the total importation for the year did not exceed 75 tons. The State Railway shops use a large number of files of all the standard sizes and shapes, and a large number of triangular files are imported for sharpening saws. British manufacturers formerly held the larger part of this trade, due to the fact that most of the technical men in the railways and industrial establishments were British, and insisted on British goods; American files, however, came in during the war and are now being more widely sold than those of British manufacture. There now appears to be a preference for American files on account of their lighter weight. Osbornes of Sheffield make two weights, the lighter of which is evidently intended to compete with the American article, but even so their light-weight file is heavier than the American Nicholson's. In order to find a ready sale in the Chilian market, a file must be light enough to sell at 65 per cent discount off the Sheffield list. Of the 75 tons imported during the year, 51 tons were of American make and 25 tons came from the United Kingdom.

GOODS POSTED TO DENMARK

The Commercial Secretary to H.M. Legation at Copenhagen has forwarded, says the British *Board of Trade Journal,* translation of a Danish customs notice, which lays down the treatment to be applied after January 1, 1923, to goods sent by post and subject to ad valorem duties. The notice provides that the addressee must, before the arrival of the goods, be in possession of the original and duplicate invoices, signed by the seller. On the duplicate invoice the addressee must declare the correctness of the invoice, accepting responsibility for any false declaration, and must forward the invoice, without any other indorsement, to the Customs Post Bureau.

THE IMPORT TRADE OF JAMAICA FOR 1921

TRADE COMMISSIONER G. R. STEVENS

V *(and conclusion)*

17. TEXTILES

(a) Bags and Sacking

	1920	Percentage	1921	Percentage
United Kingdom	£21,609	21	£6,832	29
United States	20,794	20	3,163	13
Canada	Nil		96	fractional
India	56,238	56	12,842	51

These imports consisted entirely of bags for packing sugar, coffee, cocoa and other articles of export; the strong jute gunny-bag is the type in general use for this purpose, and is supplied by India. A certain portion of the imports from the United Kingdom in both years unquestionably originated in India. The shipments from the United States were not of such high quality.

(b) Cotton Piece Goods.

	1920	Percentage	1921	Percentage
United Kingdom	£571,012	42	£139,906	30
United States	777,675	57	335,874	70
Canada	Nil		180	fractional

Of the imports from the United Kingdom in 1921, £90,873 worth of goods was manufactured but not grown in the British Empire, and £12,713 worth was both manufactured and grown in the Empire; while £10,101 represented Government imports. Since April, 1922, British cotton-piece goods have enjoyed a preference of 10 per cent ad valorem in a general duty of 20 per cent. Prior to that date, cottons of British growth and manufacture paid import duty at the rate of $8\frac{1}{3}$ per cent ad valorem; and if they were of British manufacture but not growth, they paid 10 per cent ad valorem, while foreign cottons paid $16\frac{2}{3}$ per cent. On this account, the United Kingdom has recovered a large share of the trade which went to the United States during the war, and under the new Jamaican tariff may be expected to recover still more. American competition, however, is very keen, and in spite of the disadvantageous tariff, American cottons still command a very large sale in Jamaica.

(c) Cotton, n.o.p.

	1920	Percentage	1921	Percentage
United Kingdom	£161,633	52	£57,414	81
United States	144,665	48	11,946	18
Canada	Nil		Nil	

These were imports of ribbon and other manufactures, in which the United Kngdom is normally predominant. Her recovery of some of this business from the United States in 1921 is noteworthy. Energetic manufacturers' representatives could obtain a certain amount of this trade for Canada.

(d) Silk manufactures.

	1920	Percentage	1921	Percentage
United Kingdom	£26,050	65	£8,010	42
United States	11,104	27	7,382	37
Canada	Nil		2,368	13

Under this head are included silk stockings and other articles of ladies' attire which have become very popular in Jamaica during the past few years. There are good business possibilities in these lines for Canadian manufacturers, provided quality and price are right.

18. WOODEN PRODUCTS

(a) Brooms and brushes.

	1920	Percentage	1921	Percentage
United Kingdom	£4,270	60	£1,663	57
United States	2,644	37	862	30
Canada	90	1	264	9

Only limited sales of imported brooms and brushes are possible in Jamaica, on account of the universal use of the locally manufactured article, which, though somewhat rough, is cheap and effective. The imports were of superior quality; they are used on wharves and some other commercial establishments, but very seldom for domestic purposes.

(b) Matches.

	1920	Percentage	1921	Percentage
United Kingdom	£1,165	5	£126	fractional
United States	3,524	15	8,549	41
Canada	Nil		91	fractional
Sweden	19,525	79	11,926	57

The bulk of match importations emanate from a famous Swedish firm whose agent is one of the leading merchants of Jamaica, and whose matches are energetically pushed and advertised by this agent. A small match factory operates in Kingston, but its output does not influence the demand for imported matches particularly. A celebrated Canadian match is also upon the market, but it is to be regretted that it is not up to Swedish, British or American offerings either in quality or in price. It is even more regrettable that some shipments were not up to Canadian offerings of the same match.

(c) Hoops and shooks.

	1920	Percentage	1921	Percentage
United Kingdom	£36,[illegible]	15	£1,618	4
United States	210,275	85	37,824	95
Canada	1,249	fractional	621	1

These imports consisted very largely of shooks for crating oranges and grapefruit; they also include a certain amount of barrel shooks. The fruit-crate is made of three panels, with two ends about twelve inches square, and a central panel of the same size; the crate is about 27 inches long over all. The shooks, generally of pitch pine, are usually about ten inches wide, and one each is generally sufficient for sides, top and bottom. The crate is bound at each end and round the middle with strong withes. Up to the present, these shooks—for which there is a very good demand—have come almost entirely from the Gulf Ports; and to date, Canadian exporters have not been very successful in meeting this competition, although there have recently been small shipments of shooks from Canada. There is good business awaiting the Canadian firm which meets American prices.

(d) Furniture.

	1920	Percentage	1921	Percentage
United Kingdom	£5,555	18	£2,858	17
United States	20,103	63	9,264	57
Canada	5,733	18	1,057	6

The demand for imported furniture is restricted by the activities of local artisans, who produce excellent tables, chairs, wardrobes, desks, bureaux and other household requisites, from mahogany, cedar, satinwood, mahoe and other ornamental woods grown in the colony. Another factor which limits imports is the widespread sale of second-hand furniture. There are, however, business possibilities in cheap tables and cane-seat chairs, also in chairs with solid wooden seats, bentwood chairs, and bedroom suites. A cheap refrigerator

should sell well, as present supplies are very expensive. Wicker chairs from the United States are in limited demand; a cheaper grade of wicker, recently introduced from Madeira, has acquired a certain degree of popularity.

(e) Wood, n.o.p.

	1920	Percentage	1921	Percentage
United Kingdom	£ 5,042	16	£2,028	19
United States	25,435	79	8,626	74
Canada	1,108	3	662	6

This heading includes manufactured articles not otherwise enumerated, such as bungs, handles, and bread-boards, also honey and syrup barrels and rum puncheons; there is a good opening for business in the last-mentioned article, and also, to a lesser extent, in honey and syrup barrels.

19. MISCELLANEOUS UNCLASSIFIED

(a) Polishes.

	1920	Percentage	1921	Percentage
United Kingdom	£6,006	40	£5,880	49
United States	9,583	60	5,641	48
Canada	8	fractional	367	3

There is a good market for polishes in small containers, but competition is keen. American floor, silver, brass, furniture and stove polishes, and British shoe polish, at present have most of the trade, but a Canadian line has recently entered the field, and its initial sales have been satisfactory.

(b) Blue.

	1920	Percentage	1921	Percentage
United Kingdom	£4,389	84	£4,018	97
United States	791	16	110	3
Canada	Nil		Nil	

The demand for blue, while not large, is steady, and to date an old and famous English line has been predominant in Jamaica. A Canadian blue is now on the market, in the hands of an aggressive agent.

(c) Books.

	1920	Percentage	1921	Percentage
United Kingdom	£13,167	81	£9,809	73
United States	2,615	16	3,502	26
Canada	316	2	3	fractional

School books accounted for a large percentage of these imports, and were supplied almost entirely by the United Kingdom. The reason for this is that secondary education in Jamaica leads up to the local examinations of the University of Cambridge, and the books adapted to these examinations are of course printed in England. The American supplies were largely works of fiction. The returns do not include the large importations of magazines and periodicals which come by parcels post.

(d) Candles.

	1920	Percentage	1921	Percentage
United Kingdom	£3,884	95	£880	70
United States	725	5	386	30
Canada	Nil		Nil	

The business available in this product is very small. The imports from the United States were largely candles for ecclesiastical purposes. The candle is not a popular means of illumination in Jamaica. The upper classes use electric light whenever possible, and the labouring and artisan sections of the population prefer a rudely fashioned paraffin lamp, of local manufacture.

(e) Rubber Products.

	1920	Percentage	1921	Percentage
United Kingdom	£ 3,195	17	£1,940	12
United States	11,004	64	8,232	50
Canada	3,701	19	6,636	38

The above imports include rubber heels, sanitary goods and sundries, but do not cover motor-car tires and tubes; these come under the heading "automobile parts." There is a good demand for rubber heels, and Canada is doing well in this line, in spite of strong American competition. Sundries and sanitary goods have only a limited sale.

(f) Soap, Toilet.

	1920	Percentage	1921	Percentage
United Kingdom	£ 9,650	49	£3,196	37
United States	10,984	51	4,633	54
Canada	Nil		692	8

(g) Soap, Laundry.

United Kingdom	£104,135	95	£47,763	92
Lbs.	4,824,840	95	2,122,794	92
United States	£5,432	5	£4,271	8
Lbs.	251,722	5	189,822	8
Canada	Nil		Nil	

Jamaica's soap trade is controlled by two world-renowned concerns, one British and the other American; the former supplies practically all the laundry soap used. There are a few other sources of supply, chiefly American, but the amount of business which they obtain is comparatively small. Under the circumstances, the possibilities for Canadian soaps are very limited.

(h) Cigarettes.

	1920	Percentage	1921	Percentage
United Kingdom	£20,972	21	£22,251	28
United States	67,406	76	58,567	72

The import trade in cigarettes is in the hands of the British-American Tobacco Company, operated from England as well as the United States, and supplying 80 per cent out of a monthly consumption of about 15,000,000 cigarettes. The remaining 20 per cent is supplied by cigarettes locally manufactured by a subsidiary of that concern. Canadian manufacturers who wish to bid for a portion of this business must therefore be prepared to spend money freely at the outset upon advertising and sales propaganda, and unless a genuine effort is made to capture the market with a low-grade cigarette—which is the most popular type—it is impossible to be sanguine over the opportunities for success.

NOTE ON PREFERENTIAL TARIFF

Neither in 1920 nor in 1921 did Canadian goods receive any preference under the Jamaican Tariff. The Preferential Tariff which gave effect to the Canada-West Indies Trade Agreement of 1920, was passed by the Jamaica Legislative Council on April 8, 1922, and its effect upon trade with Canada will not be apparent until the statistics for the last-mentioned year have been issued. The duty on Canadian and British goods under the ad valorem schedule is now 15 per cent, as against a general duty of 20 per cent; while in the case of the rated goods—i.e., those in which quantity is the basis of assessment—Great Britain and Canada pay 75 per cent of the general duty. The exceptions are flour, on which Canada gets a preference of 1s. in a general duty of 8s. per bag of 196 pounds; and spirits, on which the preferential rate is 22s. 6d. and the general rate 25s. per gallon.

THE RAILWAYS OF BRAZIL AND THE MARKET FOR RAILWAY SUPPLIES AND CONSTRUCTION MATERIAL

TRADE COMMISSIONER E. L. McCOLL

Rio de Janeiro, December 11, 1922.—Brazil has 29,000 kilometres of railroad under traffic, 2,273 under construction, and 7,729 surveyed and approved. The material required for upkeep and extensions, which are continually being made, is considerable. During the last eight years, owing to both the war and the financial crisis which has followed, Brazilian railways have been allowed to fall behind in the matter of repair and replenishment. Considerable material which is indispensable is being bought right along, but when conditions improve and the value of the milreis returns to something approximating normal it may be expected there will be tremendous purchasing of material, including rolling stock, in order to bring the railways into an efficient state of repair and running order as well as to build a large quantity of additional much needed trackage. Some idea of the quantity of railway material which should be required can be gathered from the following table of statistics:—

IMPORTS OF RAILWAY MATERIAL 1913 TO 1921 IN METRIC TONS

		Average per Year		Value of Imports
	1913	1914-1921	1921	for 1921
(1) Railway cars..	69,022	3,200	8.872	£ 658.698
(2) Axle wheels and accessories	10,984	4,500	8,806	492,977
(3) Rails, fish plates and railway accessories.. ..	261,547	39,900	100,277	2,369,689
(4) Locomotives	13,704	5,200	8,971	1,406,334
Total tonnage..	355,257	52,800	126,926	£4,927,698

The above figures show that during the year 1913 a total of 355,251 tons of railway material included in the four classes mentioned were imported, and that from that time up to the end of 1921 the yearly average importation amounted to only 52.800 tons. During the year immediately preceding the war there was a boom in railway construction. This fact will account to some extent for such large figures. However, that the average importation since then should be only one-seventh is without doubt not in keeping with the requirements of the country in the matter of repair, replenishment and expansion. There is a great deal of work and material needed therefore to bring the railroads on a level with efficiency and present requirements.

The foreign purchases for 1920 and 1921 were considerably over double the average of those of the preceding six years. In 1921 they amounted to more than $20.000.000, but it is questioned whether the country can afford to increase its importation during the next two years even in railway material, no matter how urgently it is required, owing to the present financial difficulties which face the country. It is quite probable that the importation of railway material for 1923 will be considerably less than that of 1920-1921 or 1922, as the new government promises to follow a course of very strict economy in all departments. It is true that the government only operates one-third of the trackage, but the present financial stress affects more or less alike all railroads.

REPRESENTATION

This outline of the railway situation is given in order to encourage Canadian manufacturers to study the situation, to have representatives appointed, and to keep them constantly informed of the c.i.f. prices of their material; to endeavour to obtain and keep some foothold, however small, on the market

in order that when conditions improve they will be already established in the field. The Brazilian market is too complicated to sell or even offer goods from a distance. Government regulations in many instances demand that tenders for government supplies must be submitted by an authorized agent in Brazil of the company submitting the tender. When tenders are called for the time allowed is not sufficient to enable an exchange of correspondence. Preliminary arrangements must be made beforehand so that a simple advice by cable is sufficient. In many instances blue prints are charged for. Specifications which are in Portuguese require to be translated. Authority must be granted by Canadian firms who wish to enter the market to make such expenditures. It is too late to do this preliminary work once tenders are called for. Representation must therefore be established. The agent appointed should be informed as much as possible of everything which enters into the life of the company he represents. The first thing to be done of course is an exchange of bank references. The Rio de Janeiro branches of the Royal Bank of Canada and the Canadian Bank of Commerce should be supplied with credit information by Canadian firms wishing to do business in Brazil. Reports on practically all important firms in Brazil are on hand at the head offices of these two banks in Canada. The agent must be supplied with complete information on the products of the Canadian factory, including c.i.f. prices. A history of the company with photographs of the factory and officials is sometimes valuable. The human element is a factor too often overlooked.

DIFFICULTIES ENCOUNTERED IN RAILROAD BUILDING

Brazil is a very extensive country, about the same size as Canada, but the railway systems in each of the two countries are very different. Canadian railways run east and west across the continent, joining the centres of population from the Atlantic to the Pacific. Canada has settlements scattered throughout the whole extent of these railways. In the case of Brazil, however, the centres of population, generally speaking, are only along the coast. As yet there has been no incentive to build lines running far into the interior as this portion of the country is as yet unpeopled and uncultivated. The time will come, however, when Peru, Bolivia and Paraguay will feel the need of direct communication by rail with the Atlantic. The needs of Brazil, together with these countries, will undoubtedly result some time in the near future in a great expansion of Brazilian railway mileage which at present is only in its initial stages. Brazil has a population of about 30 million inhabitants, has an area somewhat larger than the United States, but has only 20,000 miles of railway, compared with 250,000 miles now in operation in the North American Republic.

A glance at the map of Brazil shows that the east coast is not sufficiently supplied with rivers to bring the produce of the interior to the sea. This of course excepts the Amazon. The rivers of Brazil have their origin in the mountains which fringe the east coast and on the plateau of Matto Grosso and Goyaz. Their general direction is north and south, where they find their way to the Paraná or Paraguay flowing south or to the Amazon in the north. Development inland caused the lack of quick transportation to the sea to be felt. Railroads were then constructed from these developed centres to the nearest port. But the work was very difficult. The coast of Brazil is separated from the tablelands in the interior by a range of formidable mountains. The railroads therefore require to cross this barrier by means of steep grades, circuitous routes, tunnels, and bridges. This mountain barrier has therefore made the first few hundred kilometres from the coast of railroad building in Brazil very expensive. The railways in the north are not linked up in the interior. There is no all-steel route from the north to the south of Brazil except

from Rio de Janeiro south. The reason for this is the lack of development in the far interior and the cheapness of ocean freights. There is no Canadian Pacific running throughout the length and breadth of the country.

THE COMMENCEMENT AND PROGRESS OF RAILROAD BUILDING IN BRAZIL

There have been three outstanding periods in the history of Brazilian railroads. The first was in 1852, when a law was passed guaranteeing 5 per cent interest on the capital employed in the construction of any railway which would provide communication between the states of Rio de Janeiro, Minas Geraes, and Sao Paulo. The first railway built under this law, at present known as the Estrada de Ferro Central do Brazil, consisted of 324 kilometres of track which joined Rio de Janeiro with Sao Paulo. The construction of railroads, however, proved to be so difficult that during the first ten years not more than 300 kilometres were completed. By 1880 the number of kilometres had, however, reached 3,400. Railroading received the second stimulus after the formation of the Republic in 1889, and again in the years immediately preceding the war a further enthusiasm for railroad construction manifested itself. At this time railway projects were legion, and had not the war developed, it is quite probable that Brazilian railroad mileage would have doubled. The increase has been more or less gradual from zero in 1852 to 29,000 kilometres at the present time. To this 29,000 kilometres under traffic at the present moment should be added 2,273 under construction, and 7,729 surveyed and contemplated. The latter, however, includes many projects the fulfilment of which is in the too distant future to be considered. Some of them, however, are gradually taking definite shape. Paraguay seeks direct communication with the Atlantic through Brazil. Brazilians of Sao Paulo, Rio Grande do Sul, and Paraná are desirous of direct communication with Assumpçao. A treaty between Bolivia and Brazil brought about the construction of a little railway in the far northwest of Brazil, the Madeira-Mamoré Railway. This line, 365 kilometres in length, runs along the Madeira river and serves as an outlet for Bolivia to the Atlantic by way of the Amazon.

CLASSIFICATION OF BRAZILIAN RAILROADS

Brazil has 29,000 kilometres of track. Of this amount five out of twenty-five states possess two-thirds. Minas Geraes and Sao Paulo each have about 6,700. There is no trackage in the State of Acre. Amazonas, the largest state in the Union, has only 8 kilometres; while Piauhy has 26. Railway mileage from Minas Geraes south is out of all proportion to that which is north of this state. Immense irrigation development is at present under way in the north, in the State of Ceará, and the resultant increase in fertility in this region will undoubtedly bring about an increase in trackage.

The railways in Brazil come under five headings, as per the following table:—

	Kilometrage
(1) Railways belonging to the Federal Government and administered by it	7,749
(2) Railways belonging to the Federal Government but leased	8,561
(3) Concessions of the Federal Government with a guarantee of interest on capital expended	3,265
(4) Concessions of the Federal Government without guarantee of interest on capital expended	1,770
(5) Concession from States	7,483
	28,828

It will be interesting to note here the enormous amount of British capital which is invested in different Brazilian railways. On account of Canada's direct interest in Brazilian Traction, tramways are also included in this list:—

Alagoas and Northern Railway Company	£ 250,000
Bahia Tramway Light and Power Company	1,122,000
Brazil Great Southern Railway	821,369
Brazilian Traction Light and Power Company	43,800,000
Ceara Tramway Light and Power Company	404,502
Central Bahia Railway Trust	1,407,200
Great Western of Brazil Railway Company	4,112,050
Leopoldina Railway Company	17,666,199
Madeira-Mamoré Railway Company	1,600,000
Manaos Tramways and Light Company	600,000
Minas Geraes Electric Light and Tramways Company	209,660
Mogyana Railway (Sul Mineira Extensions)	4,000,000
Para Electric Railways and Lighting Company	1,351,923
Pernambuco Tramways and Power Company	2,176,247
Rio Claro Railway and Investment Company	2,571,871
Rio de Janeiro Suburban Tramways	652,500
Sao Paulo (Brazilian) Railway Company	6,000,000
South Brazilian Railways	961,960
Southern Sao Paulo Railway Company	1,837,000
Sao Paulo and Minas Railway	478,000
	£93,919,057

The quantity of foreign products which Brazilian railways require for their upkeep must be enormous and is well worthy of serious consideration by Canadian manufacturers. Owing, however, to the financial state of the country, as has been already indicated, it is not possible yet for Brazil to go ahead with her railroad programme in the way she would like. For the next two years railroading will be confined to upkeep of the present lines with increases in track only where absolutely indispensable.

A list of the principal railways of Brazil, giving office and cable addresses, as well as the length of track and rolling stock, may be obtained at the Department of Trade and Commerce, Ottawa, on application to the Director, Commercial Intelligence Service.

MUNICIPAL HOUSING SCHEME IN BUENOS AIRES

Assistant Trade Commissioner P. W. Cook

Buenos Aires, December 15, 1922.—The Municipal Council of Buenos Aires has entered into a contract with the "Compañia de Construcciones Modernas," whereby the latter undertakes the erection of 10,000 low-priced modern workmen's cottages, each of five rooms, kitchen and bathroom. The contract calls for the erection of 1,000 annually as a minimum. The houses are to be sold to persons indicated by the Municipal Intendant, by drawing among employees and workmen whose salary does not exceed $400 m/n monthly, preference being given to those having the largest families. The price per house is $13,750 m/n payable $85 m/n monthly, inclusive.

The scheme is of interest to Canadian manufacturers as the various contracting firms undertaking the actual work of erection are about to commence operations and are now in the market for large quantities of cement, lead and galvanized pipe, roofing, plumbing and bathroom fixtures, builders' hardware, galvanized sheet, concrete reinforcing and steel shapes. Several Canadian firms have already been approached and at the moment of writing there seems every prospect of the Dominion securing a fair share of the large orders being placed.

CUBAN MARKET FOR CERTAIN CANADIAN PRODUCTS

J. L. GONZALEZ-HOYUELA, OFFICE OF THE CANADIAN TRADE COMMISSIONER

Havana, January 2, 1923.—*Potatoes.*—Market very weak; local stocks much larger than what the demand requires. From Canada there are arriving some consignment shipments (unsold), and this has a demoralizing influence. Havana importers are selling at from $2.50 to $2.75 the sack of 180 pounds, duty paid and delivered.

In addition, there is a very sharp competition among the local trade, and there are rumours that the principal Havana potato importers, who have hitherto worked in perfect harmony, are at present at war among themselves. Another weakening factor is the new 1 per cent Cuban tax on gross sales, which has been in effect since the first of last month.

Codfish.—The Canadian codfish market is a little firmer; quotations are from $9.25 to $9.50, and sales are being made in Havana at from $10.25 to $10.75 duty paid. There have been no arrivals from Norway during the last week or ten days; on the other hand, arrivals from Halifax have been somewhat larger than usual. Norwegian quotations are from $10.50 to $11 C.I.F., and sales are made here at from $11.50 to $12 delivered.

Wheat flour.—Sales of Canadian flours continue at lower figures than United States quotations. There is a quotation of $7.25 for Canadian first patent spring flour, as compared with $8 for American flour of the same quality.

Hay and Oats.—There are large local stocks of these two articles. Some sales have been made of Canadian hay at $22 per ton.

American oats enjoy a lower quotation at present and no transactions can be made with Canada on this account.

TAX ON COMMERCIAL TRAVELLERS IN BRITISH GUIANA

TRADE COMMISSIONER E. H. S. FLOOD

Barbados, January 3, 1923.—The budget proposals of the Government of British Guiana to provide additional revenue in 1923 include a tax on commercial travellers visiting the colony for the purpose of soliciting orders, as will be seen from the following:—

(1) Every commercial traveller shall on or before the 31st day of January, 1923, register his name at the office of the Chief Commissary and shall take out a license and shall pay for the same the sum of $48, provided that any commercial traveller who shall commence business in the colony at any time between the 31st day of January, 1923, and the 31st day of December, 1923, shall within seven days of commencing business register his name as aforesaid and shall take out a license and pay the duty aforesaid.

(2) In this section the expression "commercial traveller" means any person who, whether for himself or on behalf of any other person, solicits orders for goods or effects sales from samples; provided that the expression shall not include any person who is in the regular employment of and solicits orders or effects sales for a person who has taken out a license under section 15 or 17 of this ordinance.

TARIFF CHANGES IN GRENADA

Trade Commissioner E. H. S. Flood

Barbados, January 3, 1923.—The following rules with respect to the import of matches into the Colony have been made and were gazetted on the 1st November last:—

(1) Matches imported into the Colony shall not be warehoused but shall pay duty on the importation thereof.
(2) Provided that this rule shall not apply to matches put up in tin-lined cases.

Regulation No. 11, which deals with goods which have been shipped through a foreign country before arriving in the colony, has been amended. The regulation provided that in such case the certificate of origin must be attested by the customs officer of the port that such goods have passed through the country in bond. The regulation as amended provides as follows:—

> "Where a through bill of lading or railway consignment note is not available, the ocean bill of lading from the foreign port of shipment must bear a certificate signed by the steamship company before the British consul that the goods have passed through such foreign country 'in bond' giving the number of the bonded car, in which case the certificate of origin should also be attested by the British consul."

CHANGE IN UNITED STATES COUNTERVAILING DUTIES

With reference to recent articles in the *Commercial Intelligence Journal* regarding countervailing duties of the new United States tariff, advice has been received from Mr. M. M. Mahoney, representative at Washington of the Department of External Affairs of Canada, of a new ruling of the United States Treasury Department in respect of chloride of lime (see *Commercial Intelligence Journal* No. 983, December 2, 1922, pages 896-7) and calcium nitrate and cyanamid or lime nitrogen (see *Commercial Intelligence Journal* No. 987, December 30, 1922, page 1049). The new ruling says: "As calcium acetate is the only one of the articles specified in paragraph 1541 of the Tariff Act of 1922 that is subject to countervailing duty, collectors should disregard the Canadian rates of duty for chloride of lime published in T.D. 39346 of December 7, 1922, and for calcium nitrate and cyanamid or lime nitrogen, published in T.D. 39364, of December 18, 1922."

FLAX EXPERIMENTS IN SOUTH AFRICA

Experiments are in progress in South Africa with a view to ascertaining the possibilities of flax production on a large scale, says the United States *Commerce Reports*. The decline in flax production in Russia and Ireland, it is understood, is the primary cause for the search for a new source of supply. An English expert has selected the western part of Cape Province as the most likely section in the Union for flax growing, and Russian seed has been distributed to a number of farmers for experimental purposes. The growth has been very satisfactory, and it is possible that these experiments will finally result in the opening up of an entirely new field for South African agriculture.

TENDERS INVITED

Australia

Copies of tender forms and specifications have been received from Mr. D. H. Ross, Canadian Trade Commissioner, Melbourne, for equipment and material required by the Victorian Railway Department, Melbourne, and by the Commonwealth Postmaster General's Department.

These tender forms and specifications are open to the inspection of interested Canadian manufacturers at the Department of Trade and Commerce, Ottawa (refer to file No. 27748 for signal mechanisms, and file No. 17290 for other specifications).

Tenders in conformity to the specifications should be addressed, respectively, to the Secretary, Victorian Government Railways, Melbourne, and the Deputy Postmaster General, Melbourne, Australia. Particulars of the requirements are briefly outlined thus:—

VICTORIAN GOVERNMENT RAILWAYS

No.	Date of Closing	Particulars
35457.	March 14, 1923.	Manufacture, supply and delivery of 25 dwarf electric signal mechanisms, to drawings and as specified.

POSTMASTER GENERAL'S DEPARTMENT

No.	Date of Closing	Particulars
Vic. 98.	April 3, 1923.	Supply and delivery of 5,100 receiver diaphragms, as specified.
Vic. 101	April 10, 1923.	Supply and delivery of 686 tons of bronze wire, as specified.
Vic. 103	April 10, 1923.	Supply and delivery of 714 tons of galvanized iron and steel stranded wires, as specified.
Vic. 106.	April 10, 1923.	Supply and delivery of approximately 5,000,000 paper jointing sleeves, as specified.
Vic. 97.	April 17, 1923.	Supply and delivery of 595 timing clocks, as specified.
Vic. 105.	April 17, 1923.	Supply and delivery of 400,000 copper jointing sleeves.

AGRICULTURAL DEVELOPMENTS IN THE GOLD COAST

The principal industry in the Gold Coast is the production of cocoa, the exports of which constitute about one-fourth of the world's commercial supply and have an annual value of over £10,000,000. The crop is grown entirely by natives. Attempts are being made by the authorities to assist the natives in parts of the colony where cocoa is not grown by introducing new agricultural industries, and an interesting account of these developments, prepared by the Deputy Director of Agriculture, is given in the current issue of the *Bulletin of the Imperial Institute*.

Along the 300 miles of sea-coast there is much land suitable for the planting of coconuts, which at present are only grown to a small extent in the Eastern Province. The Government have obtained on loan from the local chiefs plantations of 300 acres each in the Western and Central Provinces, and small ones amounting in the aggregate to 300 acres in the Eastern Province. The land is being planted with coconuts, and drying houses and store houses are being erected for the preparation of copra (the dried coconut from which coconut oil is obtained). It is hoped in this way to demonstrate that a profitable industry can be built up as an adjunct to the fishing industry, which is at present the principal occupation of the coast natives. When the cost of establishment has been recovered the Government propose to hand the whole concern over to the native chiefs for the benefit of their communities.

Similar action is being taken in connection with the introduction of Sisal hemp, which promises to do well in certain parts of the colony. A plantation of 1,000 acres is being used as a demonstration area, and in this case also, when the cost of establishment has been met, the plantation, complete with decorticating machinery, tram-lines, and all other accessories, will be handed over to the local chief and his people for their own benefit.

SHORT-PAID LETTERS TO PLACES ABROAD

The Post Office Weekly Bulletin directs attention to the fact that letters addressed to Great Britain, Newfoundland and other British possessions, and foreign countries are still being mailed shortpaid. One postmaster advises that in a recent despatch of British mails there were several hundred letters for Great Britain that required to be taxed before despatch, and upon which a penny or more postage will be collected on delivery, as they were prepaid only 3 cents instead of 4 cents.

Canadian firms are again reminded that the letter rate to Great Britain, Newfoundland and the British possessions generally is 4 cents for the first ounce and 3 cents for each additional ounce, and that the postage rate to foreign countries generally—with the exception of the United States and Mexico—is 10 cents for the first ounce and 5 cents for each additional ounce. The rate on postcards to Great Britain, Newfoundland and British possessions generally is 2 cents each and to foreign countries 6 cents each.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING JANUARY 16, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement on the nominal closing quotations for all the principal exchanges for the week ending January 16, 1923. Those for the week ending January 9 are also given for the sake of comparison:—

		Parity	Week ending Jan. 9, 1923.	Week ending Jan. 16, 1923.
Britain .. .. £	1.00	$4.86	$4.6732	$4.7032
France .. .. Fr.	1.	.193	.0677	.0690
Italy .. .. Lire	1.	.193	.0489	.0494
Holland .. .. Florin	1.	.402	.3981	.3999
Belgium .. .. Fr.	1.	.193	.0619	.0629
Spain.. .. .. Pes.	1.	.193	.1581	.1575
Portugal .. .. Esc.	1.	1.08	.0502	.0504
Switzerland.. .. .. Fr.	1.	.193	.1903	.1898
Germany .. .. Mk.	1.	.238	.000092	.000065
Greece .. .. Dr.	1.	.193	.0125	.0136
Norway .. .. Kr.	1.	.268	.1881	.1880
Sweden .. .. Kr.	1.	.268	.2709	.2717
Denmark .. .. Kr.	1.	.268	.2042	.1991
Japan .. .. Yen	1.	.498	.4926	.4935
India .. .. R.	1.	2s.	.3166	.3201
United States .. .. $	1.	$1.00	1.0053	1.0087
Mexico .. .. $	1.	.498	.4988	.4953
Argentina .. .. Pes.	1.	.424	.3782	.3794
Brazil .. .. Mil.	1.	.324	.1130	.1172
Roumania .. .. Lei	1.	.198	....	....
Jamaica .. .. £	1.	4.86	4.6822	4.7169
British Guiana .. .. $	1.	1.		
Barbados .. .. $	1.	1.		
Trinidad .. .. $	1.	1.		
Dominica.. .. .. $	1.	1.		
Grenada .. .. $	1.	1.	.9770—.9782	.9838—.9863
St. Kitts .. .. $	1.	1.		
St. Lucia.. .. .. $	1.	1.		
St. Vincent .. .. $	1.	1.		
Tobago .. .. $	1.	1.		
Shanghai, China .. .. Tael	1.	.708	.7275	.7393
Batavia, Java .. .. Guilder	1.	.402	.3933	.3958
Singapore, Straits Settlements .. $	1.	.567	.5529	.5546

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "THE COMMERCIAL INTELLIGENCE BRANCH OF THE DEPARTMENT OF TRADE AND COMMERCE, OTTAWA," OR THE BOARDS OF TRADE AT ST. JOHN, HALIFAX, SHERBROOKE, MONTREAL, PETERBOROUGH, TORONTO, WOODSTOCK, ST. MARY'S (ONT.), WINNIPEG AND VANCOUVER; THE CHAMBERS OF COMMERCE AT HAMILTON, ST. CATHARINES, STRATFORD, BRANTFORD, LONDON, AND VICTORIA (B.C.); BORDER CHAMBER OF COMMERCE, WINDSOR; THE CANADIAN MANUFACTURERS' ASSOCIATION OFFICES AT TORONTO, MONTREAL, WINNIPEG, VANCOUVER AND VICTORIA; AND THE KITCHENER AND WATERLOO MANUFACTURERS' ASSOCIATION, KITCHENER, (ONT.).

Cereals and Allied Products, Etc.

1089. GRAIN.—A firm in Genoa doing business as agents will be glad to hear from Canadian exporters of grain.

1090. GRAIN.—An Italian firm of importers desire to act as agents for Canadian exporters of grain.

1091. GRAIN.—A grain firm, doing business c.i.f. Genoa, desire communications from Canadian exporters of grain.

1092. GRAIN.—A well-established firm of grain brokers desire representation of Canadian exporters of grain.

1093. GRAIN.—A well-established Italian firm desire to handle Canadian grain on a cash basis.

1094. GRAIN.—A well-established Italian firm wish to communicate with Canadian shippers of grain, to be handled either on a commission basis or for their own account.

1095. GRAIN.—C.i.f. prices Italian ports are required by a firm of grain brokers. Cash against documents, Italian currency.

1096. GRAIN.—A firm in Naples desire prices on grain. Business handled either on a commission basis or for their own account.

1097. GRAIN.—Italian importers of grain desire to represent Canadian exporters.

1098. GRAIN.—A firm in Hamburg, Germany, claiming to be in touch with the Government purchasing organization, would like to form connection with large Canadian grain exporting firm.

1099. GRAIN AND OATS.—A firm of Italian grain brokers are in the market for Canadian grain and oats.

1100. GRAIN AND SUGAR.—A firm in Genoa, doing business as representatives, will be glad to hear from Canadian exporters of grain and sugar.

1101. GRAIN, CEREALS, ALMONDS.—A firm in Syracusa, Sicily, wish to hear from Canadian exporters of grain, cereals and almonds. This firm do business on their own account.

1102. GRAIN, LINSEED CAKE, ETC.—A well-established Antwerp firm, founded in 1906, desire offers of oats, barley, hay, linseed cakes and feeding stuffs.

1103. GRAIN AND OIL SEEDS.—An old-established firm of Italian grain brokers are in the market for Canadian grain and oil seeds.

1104. GRAIN, OATS, FLOUR.—A firm in Milan wish to have communications from Canadian firms able to supply grain, oats and flour. Payments effected against documents, Italian ports.

1105. FLOUR.—A large firm of Amsterdam flour importers wish to communicate with Canadian exporters of flour.

1106. FLOUR.—An Italian firm desire to communicate with Canadian exporters of flour.

1107. FLOUR.—A firm of manufacturers' representatives in Durban, Natal, desire to secure the agency for a Canadian flour mill situated as near to the coast as possible.

1108. FLOUR, ROLLED OATS.—A firm of commission agents in Holland desire to communicate with Canadian mills in a position to export flour and rolled oats.

1109. FLOUR, ROLLED OATS AND MEALS.—A commission broker in Holland is prepared to represent Canadian firms interested in exporting flour, rolled oats and meal of all kinds to the Netherlands.

1110. FLOUR, ROLLED OATS AND CORN STARCH.—A firm in The Hague wish to get into touch with Canadian exporters of flour, rolled oats and corn starch.

1111. OATMEAL, ROLLED OATS AND CORN STARCH.—A firm of commission brokers in Amsterdam are anxious to represent Canadian exporters of oatmeal, rolled oats and corn starch.

1112. SEMOLINA.—An importer in Holland desires to hear from Canadian firms wishing to develop the Dutch market for semolina.

1113. Semolina.—A Dutch concern desire to enter into communication with a Canadian shipper of fine and coarse semolina.

1114. Rye.—A Dutch firm are interested in the importation of Western rye No. 2 from Canada.

1115. Macaroni.—A firm in Holland wish samples, prices and terms from Canadian shippers of macaroni.

1116. Vermicelli.—Canadian manufacturers of vermicelli are asked to communicate with a Dutch house interested in handling that product in Holland.

Canned, Dried and Evaporated Fruits; Fish; Milk Products

1117. Dried and Evaporated Apples.—Dutch importers wish to communicate with Canadian exporters of sun-dried quarters and evaporated rings.

1118-9. Dried and Evaporated Apples, Canned Fruits.—Two large importers in Holland desire to be put in communication with Canadian exporters of dried and evaporated apples and canned fruits.

1120. Dried Apples.—A firm of commission agents in Holland wish to represent a large Canadian shipper of sun-dried apple quarters in barrels of about 200 pounds net.

1121. Dried and Evaporated Apples.—A firm of Holland commission agents are desirous of representing Canadian exporters of sun-dried quarters, evaporated rings and whole apples.

1122. Dried and Evaporated Apples, Canned Fruits.—A firm of Amsterdam commission agents are interested in representing Canadian exporters of whole, sliced and evaporated quarters in boxes; dried quarters in barrels and also canned fruits.

1123. Apples.—A firm of commission agents in Holland desire to represent Canadian exporters or dried quarters, evaporated rings and whole apples.

1124. Canned Fruits.—Antwerp firm established 1885, wish to receive offers of whole fruits, canned, such as peaches, apricots, etc., also canned pineapple and dried apples.

1125. Canned Lobster and Frozen Salmon.—Canadian exporters of canned lobster and frozen salmon are invited to send prices, terms, etc., to an interested firm in Holland.

1126. Canned Lobster, Salmon and Fruit.—A Dutch firm wish quotations, samples and terms for the importation of Canadian canned lobster, salmon, and fruit into Holland.

1127. Canned Fruit, Lobster and Honey.—A Dutch commission firm wish to represent Canadian exporters of canned fruit, lobster and buckwheat or clover honey.

1128. Canned Lobster.—A firm in Stockholm, Sweden, desire to have communications with Canadian exporters of canned lobster.

1129. Canned Salmon.—A firm in Holland are interested in importing canned salmon from Canada.

1130. Sardines.—Commission brokers, very well connected in the sardine trade, are in a good position to represent a Canadian firm in Holland and Central Europe.

1131. Condensed and Evaporated Milk.—A firm of distributors of foodstuffs at Kingston. Jamaica, wish to represent Canadian exporters of condensed and evaporated milk in cans.

1132. Condensed and Evaporated Milk.—A concern in Holland desire to represent Canadian exporters of condensed and evaporated milk in 1 pound tins.

1133. Condensed and Evaporated Milk, Milk Powder.—A large firm in The Hague wish to have samples, prices and all particulars from Canadian exporters of condensed and evaporated milk and milk powder.

1134. Milk Powder.—A large firm of commission agents in Holland are specially interested in making connections with a good Canadian producer of milk powder.

1135. Butter.—A Dutch firm of commission agents are interested in the importation of Canadian butter.

1136. Cheese.—A commission firm in Holland are desirous of representing a Canadian shipper of cheese.

Sugar, Honey, and Syrup

1137. Sugar.—A Dutch firm of commission brokers, with good connections, desire to be put in touch with Canadian refiners of granulated and bastard sugars.

1138. Brown Sugar.—A Dutch importer is desirous of making direct connections with Canadian exporters of brown sugar.

1139. Brown Sugar and Corn Syrup.—Canadian firms in a position to export brown sugar and corn syrup are invited to communicate with an importer in Holland.

1140. Maple and Cane Syrup, Sugar.—A Dutch firm of commission brokers are desirous of handling Canadian maple syrup, cane syrup, granulated and brown sugar.

1141-2. Sugar, Honey and Corn Syrup.—Two good firms in Holland wish to represent Canadian shippers of granulated and brown sugar, honey and corn syrup.

1143. Honey and Syrup.—A Dutch firm desire to communicate with Canadian shippers of buckwheat or clover honey and syrup.

1144. Honey.—A concern of commission agents in Amsterdam are interested in Canadian honey of a pure, light, stiff quality.

Packing-House Products

1145. Packing House Products.—A commission house in Rotterdam is particularly interested in representing Canadian packers of sweet pickled offals, frozen pork and pig's livers, sausage casings and general packing house products.

1146. Lard, Neutral Lard.—A well-known Holland firm wish to represent a Canadian shipper of pure and neutral lard.

1147. Oleo Stock and Oil.—A commission agent in Holland wishes to represent a Canadian exporter of oleo stock and oil.

Hides, Skins and Leather

1148. Hides, Skins and Tanned Leather.—An Italian brokerage firm, doing business on a commission basis wish to represent Canadian exporters of hides, skins and tanned leather.

1149. Sheep Skins, Skivers and Tanned Leather.—A Milan firm, doing business on a cash basis wish to correspond with exporter of the above commodities.

1150. Leather.—A long established Italian leather firm desire to correspond with Canadian leather exporters.

1151. Leather.—A firm of wholesale merchants located in Italy are interested in Canadian leather.

1152. Tanned Leather, Hides and Skins.—Correspondence is solicited by an Italian importer of tanned leather, hides and skins.

1153. Tanned and Patent Leather.—An old established firm of Italian importers wish to handle Canadian tanned and patent leather.

1154. Tanned Leather for Footwear Manufacture, Boots and Shoes.—An Italian firm doing business on a cash against documents basis require general information from Canadian exporters of the above articles.

1155. Leather, Automobile, Carriage and Saddlery Equipment.—Canadian exporters of above desiring Italian connections are asked to communicate with a long-established house in Milan.

Miscellaneous Inquiries

1156. Rubber Goods for Pharmaceutical Purposes.—A firm in Milan, doing business on a cash basis, wish communications from Canadian firms in a position to supply rubber goods for pharmaceutical purposes.

1157. Rubber Goods, Guttapercha Goods, Leather for Transmission Belts.—A firm in Milan, doing business on their own account and also as representatives, will be glad to hear from firms in Canada in a position to supply rubber goods, guttapercha goods, and leather for transmission belts.

1158. Rubber Footwear, Rubber Sponges, Hospital Rubber Supplies, Raincoats, Bathing Caps.—A firm in Milan doing business as representatives and on their own account wish to get into touch with Canadian exporters.

1159. Rubber Goods.—An old-established firm in Naples wish to effect connections with Canadian exporters of rubber goods for pharmaceutical purposes. This firm does business on a cash basis and effects payments at 30, 60 or 90 days draft.

1160. Rubber Goods, Surgical Instruments.—A firm in Rome, doing business on their own account wish to hear from Canadian firms in a position to supply rubber goods and surgical instruments.

1161. Rubber Goods, Fibre, Ebonite.—A firm in Rome doing business as retailers and wholesalers desire communications from Canadian exporters.

1162. Tanned Leather, Shoe-making Machinery, Linen Yarn.—A long-established Italian firm of importers wish to represent Canadian exporters.

1163. Tanned Leather, Grain, Cereals and Coal.—An Italian firm doing business on its own account require prices, etc., from Canadian manufacturers of tanned leather and exporters of grain, cereals and coal.

1164. Grain, Lumber and Pianos.—A well-established Italian firm of importers are in the market for Canadian grain, lumber and pianos.

1165. Grain, Lumber, Metals, Fertilizers and Chemical Products.—A long-established Italian firm wish to communicate with Canadian exporters of above. Business done on its own account, as well as acting as agents.

1166. Grain, Chemical Manures, Sulphate of Ammonia, Woodpulp, Lumber.—A firm of Italian commission brokers desire to represent Canadian shippers.

1167. Grain, Chemicals, Caustic Soda and Colophony.—Italian importers of above desire to be placed in touch with Canadian exporters.

1168. Metals, Copper Wire Bars.—A Holland firm desire quotations on Canadian metals, including copper wire bars.

1169. Furniture in Iron, Copper, Wood, Etc.—A small manufacturer of furniture of Antwerp is desirous of receiving offers of Canadian beds for hospitals, hotels, etc. Illustrations and prices of types in use are on file.

1170. Broom Handle Squares.—A British firm in Brussels wish to import, for own account, broom handle squares, 1st grade pine, free from cracks, splits or other defects, 1 inch (full) square by 48 inches to 50 inches long; in bundles of 50—or bundles of 100 pieces, if cheaper. Prices c.i.f. Antwerp in sterling or dollars. Delivery as soon as possible, which please state. Quantity desired is 30 standards per month.

1171. Binder Twine.—A firm of manufacturers' representatives in Cape Town wish to represent Canadian manufacturer of binder twine. Firms should state breaking strain, commission allowed, and terms of agency.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From St. John

To London.—Canadian Victor, Canadian Government Merchant Marine, Ltd., Jan. 24; Dunbridge, Canadian Pacific Steamships Ltd., Jan. 30; Bosworth, Canadian Pacific Steamships, Ltd., Jan. 31; Cornish Point, Furness Line, Feb. 7; Holbrook, Canadian Pacific Steamships, Ltd., Feb. 10; Brant County I. C. Transports Ltd., Feb. 15.

To Manchester (via Halifax).—Manchester Brigade Furness, Withy & Co. Ltd., Feb. 1.

To Liverpool.—Canadian Seigneur, Canadian Government Merchant Marine, Jan. 24; Montclare, Canadian Pacific Steamships, Ltd., Jan. 26; Marloch, Canadian Pacific Steamships, Ltd., Feb. 2; Montcalm, Canadian Pacific Steamships, Ltd., Feb. 9; Marburn, Canadian Pacific Steamships, Ltd., Feb. 16.

To Glasgow.—Mottisfont, Canadian Pacific Steamships, Ltd., Jan. 27; Methren, Canadian Pacific Steamships, Ltd., Feb. 10; Canadian Voyager, Canadian Government Merchant Marine, Ltd., Feb. 15; Marburn, Canadian Pacific Steamships, Ltd., Feb. 16 (via Liverpool).

To Cardiff and Swansea.—Canadian Otter, Canadian Government Merchant Marine, Jan. 31.

To Belfast.—Ballygally Head, Head Line, Jan. 25.

To Dublin.—Ballygally Head, Head Line, Jan. 25.

To Avonmouth.—Mottisfont, Canadian Pacific Steamships, Ltd., Jan. 27; Methven, Canadian Pacific Steamships, Ltd., Feb. 10.

To Antwerp.—Bosworth, Canadian Pacific Steamships, Ltd., Jan. 31.

To Rotterdam and London.—Brant County, I.C. Transports, Ltd., Feb. 15.

To London and Rotterdam.—Brant County, I.C. Transports Ltd., Feb. 15.

To Bermuda, Barbados, Trinidad and Demerara.—Mattawa, Canadian Pacific Steamships, Ltd., Jan. 27; Montezuma, Canadian Pacific Steamships, Ltd., Feb. 10.

To Havre.—Welland County, I.C. Transports, Ltd., Jan. 23; Hastings County, I.C. Transports, Ltd., Feb. 10.

To Rotterdam and Hamburg.—Ramore Head, Head Line, Jan. 15.

To Australia and New Zealand.—Trevessa, New Zealand Shipping Co., Jan. 25; Erroll, New Zealand Shipping Co., Feb. 20.

To South Africa.—Palma, Elder, Dempster & Co., Ltd., Jan. 25.

To Hull (via Halifax).—Lexington, Furness Line, Feb. 3.

To Southampton, and Hamburg.—Melita, Canadian Pacific Steamships, Ltd., Feb. 10.

To Bordeaux and St. Nazaire.—Lisgar County, I.C. Transports, Ltd., Jan. 25.

To Australian Ports.—Canadian Scottish, Canadian Government Merchant Marine, Jan. 20.

To Near East, India, and Java.—A steamer, Ellerman-Bucknalls, January.

From North Sydney

To St. John's (Nfld.).—Kyle, Reid-Newfoundland Co., Tuesday, Thursday and Saturday every week; Sable I., Farquhar Steamship Co., every Saturday.

From Halifax

To Liverpool.—Ausonia, Cunard-Anchor-Donaldson Line, Jan. 29; Andania, Cunard-Anchor-Donaldson Line, Feb 12; Canada, White Star-Dominion Line, Feb. 25.

To Londonderry and Glasgow.—Assyria, Cunard-Anchor-Donaldson Line, Jan. 29.

To Plymouth, Cherbourg, and London.—Antonia, Cunard-Anchor-Donaldson Line, Feb. 3.

To Newfoundland.—Canadian Sapper, Canadian Government Merchant Marine, Jan. 27.

To Bermuda, Barbados, Trinidad, and Demerara.—Royal Mail Steam Packet Co.'s ships Feb. 2, and every fortnight thereafter.

To Barbados, Trinidad, and Demerara.—Canadian Beaver, Canadian Government Merchant Marine, Jan. 27.

To Santiago (Cuba), Kingston, Montego Bay and St. Ann's Bay (Jamaica).—Andalusia, Pickford & Black, Jan. 31 and Feb. 28.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—Canadian Forester, Canadian Government Merchant Marine, Feb. 8

To Guantanamo, Santiago (Cuba), and Kingston, (Jamaica).—Ottar, Pickford & Black, Feb. 14.

From Vancouver, B.C.

To Honolulu, Suva, Auckland, and Sydney.—Niagara, Canadian-Australasian Royal Mail Line, Jan. 26; Makura, Canadian-Australasian Royal Mail Line, Feb. 23.

To Yokohama, Kobe, Nagasaki, Shanghai, Manila and Hong Kong.—Empress of Asia, Canadian Pacific Steamships Ltd., Feb. 22.

To Yokohama, Kobe, Shanghai and Hong Kong.—Arabia Maru, Osaka, Chosen Kaisha, Feb. 17.

From Victoria

To Yokohama, Kobe, Nagasaki, Shanghai, Manila and Hong Kong.—Shidzuoka Maru, Nippon Yusen Kaisha, Feb. 2.

To Yokohama and Kobe.—Hakata Maru, Nippon Yusen Kaisha, Jan. 31; Tokiwa Maru, Nippon Yusen Kaisha, Feb. 20.

To Yokohama, Kobe, Manila and Hong Kong.—Tyndareus, Blue Funnel Line, Feb. 17.

To Australasian Ports.—Canadian Scottish, Canadian Government Merchane Marine, Jan. 20.

To Auckland, Melbourne, Adelaide, and Sydney.—Hauraki, Canadian-Australasian Royal Mail Line, Feb. 10.

To the Orient.—Canadian Winner, Canadian Government Merchant Marine, Jan. 31.

To London and Liverpool.—Electrician, Harrison Direct Line, Feb. 2; Dramatist. Harrison Direct Line, late February.

To London, Glasgow, Liverpool, and Rotterdam.—Loch Katrine, Royal Mail Steam Packet Co., early January.

To London, Rotterdam, Hamburg, and Antwerp.—Kinderdyk, Royal Mail Steam Packet Co., end January.

To Sydney.—Waihemo, Canadian-Australasian Royal Mail Line, Feb. 10.

To Wellington, Melbourne, Adelaide and Sydney.—Waiotapu, Canadian-Australasian Royal Mail Line, about Feb. 10.

To Yokohama, Kobe, Shanghai and Hong Kong.—Alabama Maru, Osaka Chosen Kaisha, Jan. 31.

To Vancouver, Kobe, Shanghai, Hong Kong and Singapore.—Grace Dollar. Canadian Robert Dollar Line, Feb. 2.

WAGES OF UNSKILLED AS AGAINST SKILLED WORKERS IN GERMANY

Recent adjustments in the pay of common labour have constantly reduced the spread between skilled and unskilled groups, so that there is no incentive to an ambitious worker to increase his efficiency. Employers in the Berlin chemical industry early in November proposed a reduction in wages in the group of unskilled workers, but met with a flat rejection by the unions. The probability now is that the very small margin between the two classes may be entirely wiped out. A recent report from the United States commercial attaché in Berlin furnishes detailed statistics which show that in coal mining unskilled labour received 92 per cent of the pay given to skilled labour; in the paper industry the percentage runs from 96 to 99; in textiles from 89 to 92; and in metal industries from 92 to 98, with the exception of plants at Breslau and Nuremburg, where special conditions obtain.

At the present time untrained boys are doing the work of skilled mechanics and artisans and receive almost the same pay. It is unlikely that they will voluntarily undergo an arduous course of training, unless it promises ample reward in pay far above that which they at present receive.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 248 St. James street, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

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Commercial Intelligence Journal

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DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
Hon. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

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122

TABLE OF CONTENTS

Commercial Intelligence Journal

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Ottawa **Saturday, January 27, 1923** **No. 991**

EXTENSION COURSES IN EXPORT TRADE

Reference has already been made in the *Commercial Intelligence Journal* to the Extension Course in Export Trade which is to be held at the Ecole des Hautes Etudes Commerciales, Montreal. The course will commence on February 12, and will extend over a period of two weeks.

The course is divided into two parts, the first consisting of lectures, in French, by the professors of the Ecole des Hautes Etudes, and the second of lectures, in English, by officers of the Department of Trade and Commerce. These lectures will be accompanied by demonstrations, followed by discussions.

This course is the third of a series on Export Trade, the first of which is being concluded to-day at the University of Toronto, and the second, commencing on January 29, is to be conducted at McGill University.

Applications for the first-mentioned course should be made to the Director of the Hautes Etudes Commerciales, 399 Avenue Viger, Montreal, not later than February 10.

SUMMARY OF THE TRADE OF CANADA FOR DECEMBER, 1922

The summary of the trade of Canada for December, 1922, shows that, as represented in dollars, imports for consumption were valued at $70,204,888, as against $60,050,166 in December, 1921, and $85,882,153 in December, 1920. The imports from the United Kingdom in December, 1922, were valued at $11,750,825, as against $10,825,385 in December, 1921, and $11,478,316 in December, 1920. The imports from the United States in December, 1922, were valued at $49,309,720, as against $40,830,346 in December, 1921, and $64,985,722 in December, 1920. The total imports for the twelve months ending December, 1922, were valued at $762,339,309, as against $799,-478,483 for the corresponding period in 1920-21, and $1,336,921,021 for the twelve months ending December, 1920.

The value of the exports of Canadian produce for the month of December, 1922, was $110,873,425, as against $86,304,163 for December, 1921, and $149,-284,325 for December, 1920. The exports to the United Kingdom were valued at $56,523,028 in December, 1922, as compared with $42,780,724 in December, 1921, and $39,231,134 during December, 1920. The exports to the United States were valued at $36,204,744 during December, 1922, as against $28,374,629 in December, 1921, and $60,421,414 in the corresponding month of 1920. The value of the total exports of Canadian produce during the twelve months ending December, 1922, was $884,362,583, as against $802,699,820 for the corresponding period in 1920-21, and $1,272,657,442 for the twelve months ending December, 1920. The month's returns show a favourable balance of trade of $40,668,537; the returns for the twelve months' period show a favourable balance of $122,023,274.

SUMMARY OF THE TRADE OF CANADA: MONTH, NINE MONTHS AND TWELVE MONTHS ENDING DECEMBER, 1922

(Compiled by External Trade Branch, Dominion Bureau of Statistics)

Main Groups	Month of December, 1922			Nine Months ending December, 1922			Twelve Months ending December, 1922		
	Total Imports	From United Kingdom	From United States	Total Imports	From United Kingdom	From United States	Total Imports	From United Kingdom	From United States
Imports for Consumption	$	$	$	$	$	$	$	$	$
Agricultural and Vegetable Products	13,765,266	2,416,517	7,112,567	120,515,529	20,641,458	53,361,406	159,059,174	27,108,474	74,707,587
Animal Products	4,328,993	263,714	2,961,038	32,874,853	2,175,034	24,612,510	47,657,742	4,504,705	15,459,262
Fibres and Textile Products	14,203,320	5,373,704	7,245,531	116,649,491	47,699,738	52,616,778	160,120,572	[illegible]	71,[illegible]
Wood, Wood Products and Paper	2,926,493	189,444	2,675,778	26,677,120	2,164,828	23,528,688	35,028,425	2,701,001	30,107,078
Iron and its Products	9,765,758	803,660	8,720,229	100,266,529	9,674,795	89,499,617	126,467,856	12,280,[illegible]	112,7[illegible],049
Non-Ferrous Metal Products	2,921,400	296,681	2,381,945	27,211,687	2,602,455	23,025,843	34,952,616	[illegible],109,450	26,[illegible]
Non-Metallic Mineral Products	16,071,111	1,558,276	13,651,759	97,621,606	10,109,576	77,039,556	127,565,257	11,406,678	102,059,126
Chemicals and Allied Products	2,042,398	209,551	1,394,872	19,401,952	2,890,613	13,529,280	25,090,582	3,705,429	18,102,259
All other Commodities	4,180,149	639,248	3,166,001	35,971,308	5,547,792	27,056,942	45,989,682	7,107,991	34,506,084
Total Imports, 1922	70,204,888	11,750,825	49,309,720	577,190,075	103,506,289	384,270,620	762,339,309	136,806,288	509,825,760
1921	60,050,166	10,825,385	40,830,346	562,655,098	83,775,344	390,405,056	799,478,483	123,140,776	555,091,001
1920	85,882,153	11,478,316	64,985,722	1,003,335,497	174,599,130	691,490,875	1,336,921,021	231,487,979	921,235,401
	Total Exports	To United Kingdom	To United States	Total Exports	To United Kingdom	To United States	Total Exports	To United Kingdom	To United States
Exports (Canadian Produce).	$	$	$	$	$	$	$	$	$
Agricultural and Vegetable Products	64,991,473	47,461,569	7,061,647	344,047,962	232,569,114	36,804,596	397,375,826	267,354,407	41,204,133
Animal Products	11,509,916	5,222,934	4,690,836	109,159,536	54,223,963	42,632,066	135,444,631	64,876,857	54,778,732
Fibres and Textile Products	418,948	64,434	225,723	5,904,225	847,820	3,237,414	6,918,006	1,075,922	3,600,410
Wood, Wood Products and Paper	19,290,437	1,171,960	16,975,667	168,825,424	17,484,242	138,177,836	213,145,383	19,853,602	175,730,044
Iron and its Products	5,605,352	1,827,752	825,847	33,630,384	7,590,050	6,012,920	41,800,812	9,644,406	7,229,693
Non-Ferrous Metal Products	4,286,260	282,892	3,069,731	30,807,263	6,703,185	18,152,557	39,549,486	8,097,738	22,825,725
Non-Metallic Mineral Products	2,223,609	47,849	1,707,078	19,430,827	463,676	14,188,487	24,140,605	634,716	17,505,662
Chemicals and Allied Products	1,258,702	197,278	733,492	9,768,874	1,338,655	5,648,694	12,484,006	1,643,565	7,205,239
All other Commodities	1,288,728	246,360	914,723	11,004,246	1,328,583	8,306,665	13,503,828	1,570,681	10,076,609
Total Exports, 1922	110,873,425	56,523,028	36,204,744	732,578,741	322,549,288	273,161,235	884,362,583	374,751,894	340,156,247
1921	86,304,163	42,780,274	28,374,629	588,456,838	247,167,322	225,593,631	802,699,820	308,866,848	325,651,382
1920	149,284,325	39,231,134	60,421,414	974,920,719	251,145,345	442,265,216	1,272,657,442	341,168,078	559,977,503
Exports (Foreign Produce).									
Totals, 1922	1,164,596	63,992	957,895	10,649,459	593,124	8,917,309	13,815,268	875,494	11,415,052
1921	881,551	74,091	729,116	10,520,520	719,148	9,017,791	13,994,461	975,679	11,871,437
1920	1,665,656	148,058	1,371,634	17,790,477	1,127,269	15,525,323	30,147,672	2,048,745	26,071,180

THE WHEAT SITUATION IN INDIA

Trade Commissioner H. A. Chisholm

Calcutta, December 14, 1922.—Until a beginning is made in February and March of 1923 in wheat harvesting operations in the great grain-growing districts of Central and Northwestern India, it will be impossible to present even an approximately accurate forecast of the volume of the next wheat crop. Reports now coming in from the wheat-producing provinces indicate that conditions of germination are good and that precipitation is normal. If India receives her normal rainfall during December and January, it is considered probable that the next wheat crop will at least equal the splendid 1921 crop of 9,813,000 long tons, which was some half a million tons above the average yield of the preceding five years.

NO EVIDENCE OF EXPORT MOVEMENT

Notwithstanding the fact that the Indian wheat crop harvested in the spring of 1922 was well above normal, there has not yet been any evidence of an export movement. The history of Indian wheat movements has generally been that several hundred thousand tons of export follow a good harvest, and that on the other hand heavy importations of Australian wheat followed a subnormal crop. For example, the record crop of 10,236,000 tons for the year 1916-17 was followed by exports of 1,454,000 tons in 1917-18, while the low yield of 6,700,000 tons in 1920-21 was followed by the importation of 450,000 tons of Australian wheat in 1921-22. The 1922 crop has had the effect of checking imports during the last seven months of 1922, and India is at the present time in a position of being neither an importer nor an exporter of wheat.

It appears that India's interior wheat reserves were almost entirely depleted by the unfavourable crop of 1920-21, and that these reserves are in process of being restored from the proceeds of the 1922 harvest. India will probably not be in a position to export wheat until she is assured of a crop in 1923 of something approaching 10,000,000 tons.

INCREASED DEMAND FOR FLOUR

Although Indian wheat prices have been displaying a slightly downward tendency during November and December, price levels are still fairly high as compared with those ruling in other wheat-producing countries. Prices at Karachi—the leading wheat port—are now between the equivalent of $1 and $1.20 per bushel for grades equal to Nos. 3 or 4 Northern. Indian wheat prices have displayed very little movement in 1922.

Agricultural experts in the employ of the Government of India are of the opinion that one effect of the high wages enjoyed by Indians during and since the war has been an increase in the consumption of bread and cakes made out of wheat flour, and that this refinement in taste will probably remain. It is a significant fact that during 1922, when the majority of miscellaneous Indian industrial establishments had the greatest difficulty in keeping their heads above water, the flour mills have been working to capacity and have been paying large dividends.

In the past Indian wheat has been exported chiefly to the United Kingdom, Egypt, Italy, and Germany. Exports of wheat flour—which have recently averaged between 50,000 and 70,000 tons annually—are normally destined for Egypt, Turkey, Arabia, Persia, Ceylon, and East Africa.

THE FINANCIAL AND POLITICAL SITUATION IN INDIA

Trade Commissioner H. A. Chisholm

HEAVY GOVERNMENT DEFICITS

Calcutta, December 20, 1922.—India's most pressing problem at the moment is neither the suppression of the Non-Co-operation movement (which is moribund if not entirely dead) nor the extension of the generous measure of self-government already enjoyed, but simply one of making ends meet. A most serious financial situation has been recently disclosed at a conference of Central and Provincial Government representatives. Notwithstanding the fact that revenue from all sources in 1921 and 1922 showed advancing increases over those of all previous years, the Central Government's uncovered deficit amounts to some $30,000,000, while most of the provinces have incurred deficits amounting to another $30,000,000. Some of India's provinces have brought forward deficits for four years in succession, and only two out of the nine have managed to balance revenue and expenditure.

HIGH ADMINISTRATION COSTS

It appears that one of the chief causes of these unbalanced budgets has been the increasing cost of the maintenance of the enormous staffs apparently required by the detailed establishments employed by the Provincial Governments. A serious concerted effort is now being made to retrench all governmental expenditure. The first step in this direction was the appointment of a Retrenchment Committee headed by Lord Inchcape and composed of some of the most prominent business and governmental leaders in India. At the moment of writing this committee is sitting in Delhi, and their avowed intention is to ascertain the means of cutting expenditure to meet existing revenue. It is apparently not the intention that taxation shall be increased in order to balance expenditure. India cannot stand heavy taxation directly or indirectly as practised by northern countries, and it is considered that burdens of fresh taxation can be borne neither by the masses of the country nor by capital invested in India. It is almost certain that the Retrenchment Committee will set its face resolutely against any increase in the customs tariff.

EXTENSIVE PROVINCIAL CAPITAL PROGRAMMES

Many of the Provincial Governments contemplate extensive expenditures on industrial and public improvements to be financed from loan funds. The Madras Presidency will require about $45,000,000 within the next five years for roads, buildings, and irrigation projects. The Government of Bombay propose to spend over $40,000,000 on irrigation works alone. Bengal intends to build a huge bridge across the Hooghly at Calcutta which will cost at least $10,000,000. The United Provinces will have to raise $30,000,000 within the next five years in order to carry out their irrigation projects and developments of forests and roads. The Government of Punjab have under consideration large irrigation and hydro-electric projects which will require an expenditure of about $140,000,000 up to the year 1940. The total requirements of the provinces for capital projects within the next five years is estimated at not far short of $100,000,000 per annum. A large proportion of this contemplated capital expenditure will be on productive enterprises most urgently required, which will increase not only India's productive capacity but also her purchasing power.

INDIA'S FINANCIAL DEPENDENCE ON ENGLAND

The Provincial Governments are now beginning to realize that they must go to London to raise these loans, and that the money will not be forthcoming unless London is satisfied that the provinces have achieved a measure of financial and political stability. There is therefore in evidence among the leading spirits in the Indian community a growing realization of the value of British connection to the welfare of India. The Non-Co-operative movement has become more and more discredited until very little is now heard of it, and "Ghandi caps" are now rarely seen in districts where they had been very numerous until a few months ago. India seems to have reacted from her recent wave of political unrest, and the spirit of 1923 appears to be one of co-operation in making the present form of self-government a success and in raising the country's level, financially, industrially and socially.

INDIA'S FOREIGN TRADE SHOWS AN INCREASING FAVOURABLE TRADE BALANCE

Trade Commissioner H. A. Chisholm

Calcutta, December 20, 1922.—Trade reports recently issued by the Government of India and by the collectors of customs at the leading Indian ports indicate that the values of Indian products exported continue to increase, while the values of foreign merchandise imported continue to decrease. During the seven months April to October, 1922, exports of merchandise from India amounted in value to 163 crores* of rupees as against imports of foreign merchandise of 127 crores of rupees, leaving India a favourable merchandise balance of trade of no less than 35 crores of rupees as compared with unfavourable trade balances of 18 crores and 27 crores for the corresponding periods of 1921 and 1920 respectively. However, imports of gold and silver treasure and bullion nearly doubled in value over 1921, so that including treasure and currency transactions India has a net visible favourable balance of trade for the seven months period of 1921 of over 9 crores or nearly 30 million dollars, as compared with an unfavourable trade balance of 14 crores and 8 crores during the corresponding periods of the two previous years.

The trade report for November published by the Collector of Customs at Calcutta is even more indicative of the buoyancy of India's export trade. While the values of foreign goods imported into Calcutta during the month of November fell off to 3⅓ crores as compared with 9 crores during the previous month, the value of the exports advanced from 10½ crores in October to 13¼ crores in November. This latter figure creates a three-year record for Calcutta's monthly exports. Not since November, 1919, has the value of Calcutta's export trade been greater. In comparison with November, 1921, imports during November, 1922, fell away in value to the extent of over 30 per cent, while exports advanced in value nearly 40 per cent.

Practically every Indian export commodity is sharing in this general prosperity. Jute, tea, rice, linseed, and opium score the heaviest advances.

DIRECTION OF EXPORT TRADE

With the exception of Cuba, India's export trade to Continental Europe continues to show greater comparative expansion over last year than to any other part of the globe. The following figures give the total values of Indian

* A crore of rupees is equal to approximately $3,000,000.

merchandise exported to leading countries during the seven months April-October, 1922, as compared with the corresponding period of 1921:—

Countries	Seven Months, April 1 to October 31, 1921 Crores of Rupees	1922 Crores of Rupees
British Empire—		
United Kingdom	22.57	31.11
Hong Kong	3.84	4.33
Canada	.85	.97
Australia (including New Zealand)	2.73	4.03
Total British Empire	51.02	63.20
Foreign Countries—		
Germany	7.88	12.26
Belgium	3.37	5.51
France	4.58	8.05
Italy	2.39	5.34
China	6.22	8.04
Japan	18.77	18.25
United States of America	13.54	16.82
Cuba	.65	3.13
Total Foreign Countries	71.12	92.03
Grand total	122.14	155.23

The above figures reveal that, notwithstanding the immense quantities of jute and skins that go from India to the United States, Japan is India's second best customer, largely accounted for by the fact that a large proportion of the Indian cotton crop is exported to that country. While the United States is India's third best customer, Germany is a good fourth. It is an interesting commentary on the revival of the sugar industry that India shipped 25,000,000 sugar bags to Cuba during the seven-months period of 1922, as compared with 7,000,000 bags during the corresponding period of 1921.

IMPORTS

Although the total value of India's imports of merchandise decreased from 147 crores during April to October, 1921, to 133 crores during April to October, 1922, the decreased imports of Java sugars account for two-thirds of this shrinkage. On the whole, the volume of goods imported has shown increases in 1922 as compared with 1921. This is especially true of piece goods. During the seven-months period of 1922 a total of nearly 850,000,000 yards of piece goods was imported, as compared with a little over 600,000,000 yards during the corresponding period of 1921. Over 90 per cent of these totals are from the United Kingdom and nearly all the remainder from Japan. Very large replacement orders for machinery were placed in India last year, but this trade has shown a falling off in 1922. On the other hand, imports of metal goods such as wrought copper, iron and steel, bars and channels, bridgework, bolts, nuts, nails, sheets, piping, etc., have more than doubled in volume, although the value has shown comparatively little increase owing to lower prices.

CANADA LEADS IN MOTOR CAR SHIPMENTS TO INDIA

Owing to the fact that many of the shipments of Canadian goods to India have been credited to the United States, official Indian statistics do not show the true situation of Canadian export trade to India. During the seven-months period of 1922 under review, over 60 per cent of the 2,411 motor cars imported into India were made in Canada. During the same period Canadian-made

motor car tires and tubes were imported to the value of over $300,000. Canada's export trade with India in 1922 will probably amount to several millions of dollars as compared with a total of only $226,000 in 1913.

INCREASED PURCHASING POWER EXPECTED IN 1923

India's buoyant export trade is bound to have its favourable effect on the purchasing power of the country in the very near future. Many merchants dealing in metals and mill supplies now report that they are short of stock. As a rule buyers have been holding off during 1922 for lower prices. The feeling is now making itself apparent that prices will probably go little lower in 1923, and may go higher. Merchants confidently expect that this sentiment will have its favourable reaction on buying early in 1923.

Rupee exchange is also strong, especially in relation to New York. Three months ago it required between Rs. 340 and Rs. 350 to purchase a $100 draft on New York. To-day this rate stands at Rs. 325 to $100. Some American manufacturers, whose prices were out of line a few months ago, are now finding that the recent enhancement in rupee exchange is enabling them to quote somewhat more favourably.

Canadian manufacturers interested in the Indian market are urged to keep this office supplied with their latest catalogues and prices, c.i.f. Indian port, if possible. India is an extremely difficult market for the introduction of new lines, especially from North America, and importers can be interested only when offered tempting prices.

TRADING POSSIBILITIES IN HOLLAND FOR CANADIAN PRODUCTS

Trade Commissioner Norman D. Johnston

Dried and Evaporated Apples in Demand

[*This is the third of a series of reports by Mr. Johnston on Trading Possibilities in Holland for Canadian Products. The first, on Grain and Feeding Stuffs, was published in "Commercial Intelligence Journal" No. 982 (November 2, 1922); the second, on the Demand for Flour, in No. 984 (December 9, 1922).*]

PRINCIPAL SOURCES OF SUPPLY

Rotterdam, December 29, 1922.—Dried and evaporated apples find quite a large sale in Holland. The United States has been by far the largest source of supply, Californian and New York State exporters being the principal participants. Switzerland, Germany, and Great Britain have furnished Holland with some of her requirements, while Canada has also done quite a nice little trade, chiefly in sun-dried quarters. The following figures will indicate the quantities imported into the Netherlands, with their respective values, during 1921 from the main countries of supply:—

	Quantity Kg.	Value Guilders
Germany	170,848	110,008
Belgium	29,039	15,406
Great Britain	140,199	68,147
United States	3,590,882	2,533,051
Italy	20,660	12,446
Switzerland	187,280	109,416
Canada	38,749	35,232
Total	4,215,374	2,895,034

PRESENT CONDITIONS

The year 1922 has not offered such a good market in Holland for dried and evaporated apples as usual, as the fruit and vegetable crop has been very good this year and Germany, which is the principal market for these Dutch products, has been unable to buy in quantity on account of her depreciated currency, with the result that fruit and vegetables have been available in abundance in Holland at fairly reasonable prices and the demand for imported dried and evaporated apples has therefore not been so great. Notwithstanding, the imports during the first eleven months of this year amounted to about 2,243,000 kg. with a value of approximately 1,844,000 fl., as compared with 3,534,000 kg. valued at 2,319,000 fl. during the same period of last year. The United States furnished about 1,980,000 kg. with a value of 1,664,000 fl., Switzerland 103,000 kg. valued at 65,000 fl., and Canada 48,000 kg. with a value of 46,000 fl., according to the preliminary statistics.

CANADIAN SUN-DRIED QUARTERS POPULAR

Holland is the principal market in the world for dried quarters. Canadian sun-dried quartered apples meet with high favour in Dutch opinion, and although a fair trade has been done, there is undoubtedly a splendid opportunity greatly to increase the trade from Canada. While the figures of import from the United States probably contain shipments of Canadian dried apples, nevertheless the Canadian exports are not nearly as large as they can or ought to be. Providing buyers can get Canadian sun-dried quarters at competitive prices, they will in most cases purchase them before those from other sources.

The difficulty has been that sufficient quantities of Canadian sun-dried quarters at competitive prices have not been obtainable, with the result that New York State exporters have been doing a good trade in so-called sun-dried quarters which from appearance seem to be evaporated and made as far as possible to be like the Canadian product. The colour, however, is not as good as those from Canada and they, according to general opinion, will not keep as well as the Canadian quartered apples.

CONTAINERS

The Californian shippers have also been doing a good business at fairly low prices. Many of the New York State exporters have been adopting the Canadian method of using barrels containing about 200 pounds net, or roughly about 100 kg. or 220 pounds gross, while some have been using boxes comprising 50 pounds net. The Californian shippers, however, have been using almost wholly boxes of 50 pounds net, which have become very popular on the market, although the barrels are not a deterrent to trade, as both methods are liked, price and quality being the main consideration.

Opinion seems to differ slightly about the best-sized barrel for the trade, but the consensus of opinion appears to be in favour of barrels about 100 kg. or 220 pounds gross or net about 200 pounds. Other opinion has been expressed that the barrels should be between 115 and 125 kg. gross with a tare of about 9 kg. per barrel. For the lower grades (brown), barrels of 2½ cwt. or 125 kg. have been suggested.

PRICE AND QUALITY

The New York State apples have been selling somewhat cheaper than the Californian products. The so-called "States" apples are more bitter than the sweeter Californian apples and are therefore liked better in Holland. The flavour of Candian apples is, however, in highest favour.

Fancy and choicest qualities are in greatest demand in Holland. Prices vary, but at present New York fancy quarters are selling at about $14 per 100 pounds c.i.f. Holland, while choice quarters are quoted at about $12.75 per 100 pounds to the importer. The colour and flavour as well as the keeping qualities of Canadian quarters are preferred, but business can only be done if the difference in price is not more than $1 per 100 pounds. If therefore Canadians can supply good quality sun-dried quarters at a price not exceeding $1 over the above quotations, or in general the prices of New York State or Californian apples, to the importers, a large business should result.

EVAPORATED RINGS, SLICES AND WHOLES

Evaporated rings and slices find a large sale in Holland, while there is also a small trade in evaporated whole apples without cores. California does the largest business in these lines.

The colour of the Canadian evaporated rings or slices is not liked as well as the United States products, as they are too dark. The light bleached colour of the American varieties is much preferred. If the colour of the Canadian products could be improved to resemble those of the United States, particularly California, a much better trade could be done providing prices are competitive.

Prime quality rings are in greatest demand. Shipments of rings, slices or wholes are generally received from the United States in boxes of 50 pounds net. Imports also sometimes arrive in boxes of 25 kg.

APPLE WASTE

In the past there has been quite a large trade done in dried apple skins and cores, which are used by jam and jelly manufacturers in Holland and in the Rhine districts of Germany. One firm alone in Rotterdam imported per year before the war about 20,000 barrels of this dried apple waste.

In recent years very little trade has been done in apple offals as the price has been too high in comparison with the price of apples in Holland. The importation price at present from the United States is about 4 cents per pound c.i.f. Holland, which is too high. If on the other hand Canada could supply cores and skins at about 2 cents per pound c.i.f. Dutch ports, a very good trade could probably be developed.

KINDS

The hard winter apples give the best cores and skins for this purpose, but there would appear to be no reason why the cores and skins of windfalls or other kinds of apples should not be used providing they are in good condition and are well dried for shipment.

PACKING

There are no particular requirements with regard to packing, but the main consideration is that the waste should be well dried and kept dry in transit. For this purpose barrels will probably be more satisfactory than bags, as the product would then be kept in a drier condition during the long freight journey from Canada to Holland. If used barrels are utilized, care should be taken that they did not previously contain anything which would impart a flavour or cause fermentation. Sugar or flour barrels would likely be suitable for this purpose. Imports have generally come in barrels of about 100 kg., but the weight is not an important consideration. Price is the main point of note.

CARE IN THE APPOINTMENT OF AN AGENT

The best way to develop a business in these lines is to appoint a good agent well known in the trade, who should be kept informed regularly of prices which he can keep constantly before the attention of the leading buyers. In this regard the Canadian Government Trade Commissioner, who is acquainted with practically all the principal dried fruit firms in Holland, can be of great assistance in getting Canadian concerns in touch with the most suitable Dutch agents or importers. Great care should be taken in the selection of an agent, as there is a great difference between the various firms engaged in the dried fruit business in Holland. No Canadian firm should appoint an agent without first consulting the Trade Commissioner in Rotterdam.

CONSIGNMENTS

Certain of the dried fruit brokers maintain that the only way to introduce a new brand of dried or evaporated apples is to send the products on consignment to the agent, but in the opinion of the writer this is very doubtful procedure under existing conditions, and before adopting this method great care should be taken with regard to the standing of the agency firm. Under certain conditions it might be useful to send a consignment shipment when a reliable agent has been selected, in order to have a stock in the country at a time when spot lots are obtaining higher prices than future deliveries. It is, however, difficult to check up consignment dealings, as commission, freight, discharging, duty, documents, stamps, declarations, storage, insurance, telegrams, cartage, repairing, delivery, etc., charges have to be taken into consideration.

TERMS, QUOTATIONS AND COMMISSIONS

It should be possible, until the reliability of the representative has been ascertained, to submit samples in sufficient quantities and do a business on a cash against documents Holland basis with c.i.f. Dutch port quotations submitted regularly, which is the usual method. Some firms make their terms cash against documents Holland less 1 per cent, while others give three days' sight draft after receipt of documents. It is purely a matter of calculation.

The usual commission is 2, 2½ or 3 per cent, according to arrangement, and whether correspondence and cables are to seller's or agent's account.

It is usual for people in Holland to buy the new crop as early as possible; in fact, very often before the crop is ready for export, so that business was being done in May, June, and July for October-November shipment. Stocks of dried and evaporated apples are fairly large in Holland at the present time, but buyers are nevertheless continually in the market.

In conclusion, let it be reiterated that Canada has a good opportunity to do an increased trade in Holland, and Canadian firms are invited to communicate with the Canadian Trade Commissioner, sending samples, prices, and all necessary details, with an intimation of what policy it is desired to adopt in the development of the Dutch market, when they will be put in touch with likely concerns. It is hoped a much larger export trade in dried and evaporated apples from Canada to the Netherlands may be the result.

BRITISH SUGAR CONSUMPTION AND PRICE MOVEMENTS IN 1922

Trade Commissioner Gordon B. Johnson

Glasgow, January 5, 1923.—The total consumption of sugar in Great Britain for the past three years is shown in the following table, together with the probable importations of refined sugar:—

	1922 Tons	1921 Tons	1920 Tons
Meltings of raw sugar in London and Liverpool (England) and Greenock (Scotland)	1,000,000	950,000	937,325
Probable consumption of foreign refined	578,000	470,000	340.000
	1,578,000	1,420,000	1,377,325

The five Greenock (Scotland) refineries have maintained a fairly steady output for most of the year 1922.

Early in January the price of Greenock fine granulated was 45s. per cwt. (112 pounds), and within a week it had fallen to 44s. 6d. In the third week it was 45s. 3d., and at the end of the month 46s. 9d. was paid. In February easier prices ruled, and at the end the quotation was 45s. 9d. Markets were firmer in March with the quotation about 48s. April and May showed a decline of 6d. each month till the end of the latter, when 47s. 9d. was quoted. Firmness was shown in June, July, and part of August, the price rising to 52s. 3d., the highest figure of the year, but a reaction set in at the end of August, when business was done at 50s. 6d. The fall continued, and at the end of September 48s. was the quotation. There was a good demand in October with price up to 49s. 9d. at the close. During November and December prices were steady, and 49s. 3d. was the price at the close of the year.

Greenock refiners have been able to sell considerable quantities of their sugars in London and the south of England throughout the year, but the Irish troubles have injured business in that country. Germany took a fair quantity in May, but this will doubtless not occur again, as she should shortly produce enough for her own wants at least.

For the past few weeks the Greenock supply has been greater than the demand, and the melt has consequently had to be reduced. There was an absence of the usual increased demand at Christmas, no doubt caused by the scarcity of money arising through unemployment.

At the beginning of 1922, American granulated was being sold here at 18s. c.i.f. for arrived, and at 17s. 1½d. for January-March shipment. (C.i.f. of course does not include import duty paid.) The price advanced to 19s. at end of January, at which there were sellers from second hands, but New York was asking 6d. to 9d. more. A decline to 18s. 3d. followed in February, but before the end of that month prices improved and the improvement continued till 21s. was reached early in April. In May the price fell to 20s., but by June there was an advance to 23s., and by July to 24s. 9d. Early in August the price had reached 29s. 9d. for September shipment, which was the highest point touched. At this time considerable quantities were resold to America as prices there were much above those obtaining on this side, and this condition has prevailed almost to the end of the year. About the middle of December sales were made from 22s. 9d. to 23s. c.i.f. for February-March shipment. At the end of the year 24s. was asked by New York refiners for this delivery.

Since the beginning of October a large business has been done in Continental granulated.

For the last week of the year business has been quiet with the Clyde (Greenock) sugar refiners, prices remaining unchanged at 50s. to 50s. 3d. for fine crystals, 49s. to 49s. 3d. for fine granulated, at 48s. 6d. to 48s. 9d. for ordinary, also at 37s. to 41s. for yellows, all per cwt. (112 pounds) duty paid.

STATE OF TRADE IN MANCHESTER AND DISTRICT

Trade Commissioner J. E. Ray

Manchester, January 4, 1923.—If the old year closed with few visible signs of a general trade revival, the New Year has been ushered in with large hopes of an all-round improvement not far distant. Even the pessimists are of the opinion that the worst of the protracted depression is over, and many trade reviews, as well as numerous public and business men, are heralding the advent of better times. The uncertainty of a revival of buying by foreign countries, however, casts a cloud over the textile industry of Lancashire, for, as every one knows, that industry depends mainly upon foreign markets for its existence.

Upon the cotton trade conditions and prospects, a well-informed writer in the January issue of the *Export World and Commercial Intelligence* states:—

> The experience of spinners and manufacturers during December has not been at all satisfactory. There has been a tendency for most firms to lose ground. Although numerous producers are running short time and have idle machinery, the output has not been sold. It has been a question of making to stock or curtailing production on a larger scale. The inactivity has been very largely due to the belief on the part of buyers in lower values. Owing to the absence of support, yarn and cloth prices have given way quite irrespective of the easier movement in raw cotton rates. The opinion prevails that a large trade will not be done, especially with Eastern countries, until prices are on a lower level, and bleachers, calico printers and dyers are being urged to reduce their charges, as prices for such processes have not come down to the same extent as costs in other directions. A move has been made in one quarter in that the prices for finishing are to be reduced from the beginning of 1923. The financial stringency continues very harassing, and more failures have been reported.
>
> From the point of view of prices, cloth manufacturers are doing worse than ever. Owing to the financial difficulties of certain firms, stocks are being slaughtered and goods sold at almost any price. The process is having a very weakening effect, and it is quite impossible for producers to book orders to make at profitable figures. As a result of the weakness in prices, buyers have been afraid to operate, owing to the possibility of being able to purchase on more advantageous terms a few days later.

The Leather Trade.—The tanners of the district report some improvement in demand, and a brighter outlook for January. Prices remain firm, and stocks are low. The belief is that there will be a much livelier call for leather during the next three months.

The Engineering Trade.—The engineering industries, with the exception of those engaged on textile machinery, have no improvement to record in comparison with bygone months of 1922.

The Timber Trade.—The outlook for the timber trade is characterized by uncertainty. The majority of importers seem determined to purchase only for immediate requirements. No one likes the industrial and financial situation at the present time. There is a fear that wood values have no stability, and therefore buyers will avoid being loaded with stocks until the atmosphere becomes clearer.

As far as Manchester is concerned, every one realizes that the strongest firms have had some difficulty in weathering the storm of 1922; on that account they will naturally move this spring with caution under conditions which really exhibit no appreciable improvement over those of last year.

OF INTEREST TO FIRMS SELLING CUSTOMS FORMS

The Commercial Intelligence Branch of the Department of Trade and Commerce, for the information of Canadian exporters, has issued several leaflets dealing with the customs regulations of British and foreign countries in regard to invoices, certificates of origin, etc., required for goods imported into such countries. It is quite practicable in many instances for Canadian exporting firms to print their own invoice forms and necessary accompanying declarations from the information given in these leaflets. Sometimes, however, the exporter would find it more convenient and economical to purchase a number of blank forms already printed. Consequently the Commercial Intelligence Branch is occasionally asked where blank forms may be obtained for actual use in preparing the necessary documents to cover shipments of Canadian goods sent abroad. It is desired to assist firms making inquiries of this kind. Commercial stationers and others therefore who are offering for sale any of the forms in question are invited to send their names and addresses to the Director, Commercial Intelligence Service, Ottawa, specifying the form or forms they are in a position to furnish. In doing so, quote file No. 24872.

JAMAICA'S EXPORT TRADE WITH CANADA IN 1920, 1921 AND 1922

F. L. Casserly, Office of the Trade Commissioner

Kingston, December 29, 1922.—A scrutiny of the statistics of Jamaica's export trade with Canada during 1920, 1921 and 1922 reveals the increasing value and importance of the Canadian market to Jamaican producers. Although Canada is still, in some commodities, a small buyer in comparison with the United Kingdom and the United States, it will be seen that in others she is Jamaica's chief customer, and that she absorbed considerably larger quantities of several items in 1921 and 1922 than she did during the previous year. Thus the benefits accruing to Jamaica from the Canada-West Indies Trade Agreement, which became operative from the Canadian side as from January 1, 1921, are seen to be very substantial; and it may legitimately be hoped that the foundation has been laid for a much larger export trade with the Dominion in future years.

The following table gives a comparison between the quantities of the principal items exported to Canada during 1920, 1921, and 1922 up to December 2. The figures for the present year have not yet been revised by the Customs Department, and must therefore be considered as only approximate. Values not being obtainable for 1922, they have been excluded from the previous years' returns; but it might be mentioned that in 1920, out of a total export trade valued at £7,146,010, Canada's share was £1,563,298, or 22 per cent of the gross amount; while in 1921 Canada absorbed £417,804, or 13 per cent out of a total of £3,357,692. This shrinkage was due to the decline in the value of Jamaican products—mainly sugar—in the world's markets, and, as will be evident from the quantity statistics, does not denote any general falling-off in volumes exported.

It should be noted that the Jamaican statistics do not differentiate exports to Canada via the United States, such exports being credited to the latter country. In the case of bananas, the volume of this indirect trade is known to be large, and in the aggregate of all the other items it is probably likewise considerable. The figures, therefore, can only give an approximate idea of Canada's purchases from Jamaica.

PRINCIPAL ITEMS OF EXPORT FROM JAMAICA TO CANADA DURING THE YEARS 1920, 1921 AND 1922

	1920	Percentage	1921	Percentage	1922 (to Dec. 2)	Percentage
Bananas (stems)						
Total exports	9,037,028		9,959,144		11,779,121	
Exports to Canada	Nil		483	fract.	6,027	fract.
Cocoa (cwt.)						
Total exports	50,448		64,960		71,409	
Exports to Canada	1,171	2	7,000	11	6,867	9
Coconuts (nu.)						
Total exports	28,246,240		24,224,448		29,284,541	
Exports to Canada	682,300	2	1,401,029	5	2,308,135	8
Coffee (cwt.)						
Total exports	41,269		64,579		50,189	
Exports to Canada	27,061	65	33,193	51	39,799	80
Ginger (cwt.)						
Total exports	14.594		12,361		13,392	
Exports to Canada	957	7	1,900	17	452	3
Goatskins (lbs.)						
Total exports	107,123		136,000		53,375 (a)	
Exports to Canada	22,004	21	9,362	6	No returns	
Grapefruit (No.)						
Total exports	1,705,900		2,802,156		2,006,270	
Exports to Canada	298,760	16	1,263,897	45	764,050	39
Hides.	Lbs.		No.		No.	
Total exports	357,928		6,654		9,712 (b)	
Exports to Canada	159,861	45	4,200	63	No returns	
Honey (gallons)						
Total exports	87,745		63,407		92,589	
Exports to Canada	3,846	4	2,816	4	2,932	3
Oranges (no.)						
Total exports	20,232,200		21,238,000		8,027,569	
Exports to Canada	1,733,400	8	730,200	3	177,112	2
Orange Oil (lbs.)						
Total exports	99,731		90,380		80,318	
Exports to Canada	3,665	4	7,250	9	4,110	5
Pimento (cwt.)						
Total exports	67,569		80,492		94,525	
Exports to Canada	1,658	2	1,852	2	3,351	4
Rum (gallons)						
Total exports	743,608		958.788		749,675	
Exports to Canada	110,643	15	20,002	2	54,355	7
Sugar (cwt.)						
Total exports	733,287				955,760	
Exports to Canada	329,799	45			701,640	74
(a) *Dark Crystals* (cwt.)						
Total exports			86,022			
Exports to Canada			66,839	78		
(b) *Yellow Crystals* (cwt.)						
Total exports			424,888			
Exports to Canada			201,302	47		
(c) *Muscovado* (cwt.)						
Total exports			25,816			
Exports to Canada			24,711	96		
Molasses (gallons)						
Total exports	22,640		694		No returns	
Exports to Canada	7,760	37	200	28		
Tobacco (*Cigars*) (lbs.)						
Total exports	164,665		114,381		84,254	
Exports to Canada	2,176	1	1,199	1	1,173	1

NOTES ON FOREGOING TABLE

Bananas.—Though an important asset to the colony, this crop is subject to wide fluctuations in volume and value on account of its liability to damage by hurricanes. The subject of insurance against this risk has from time to time been broached, and the Jamaica Legislative Council has just passed a resolution

(a) To June 30, 1922. (b) Up to June 30, 1922.

authorizing the Government to discuss the question tentatively with a British insurance company's representative, who is expected to visit Jamaica in the near future for this purpose.

Despite a drought in one of the principal banana-growing areas, production in 1922 greatly surpassed that of the two previous years; this is due mainly to the absence of a hurricane, and also in some measure to the collapse of the sugar market, which caused a number of small planters to turn their attention to bananas.

In so far as direct importations are concerned, Canada's share of this trade is infinitesimal, on account of the lack of shipping facilities to, and an adequate distributing organization in, the Dominion. Jamaica's banana trade is controlled by a large and powerful United States corporation which has machinery for distributing in Canada; and until Jamaican growers can avail themselves of an independent system of transport and distribution, Canada's imports of Jamaican bananas will continue to come via the United States. At present, it is estimated that such imports aggregate 2,500,000 stems per annum, which are distributed through Boston, Baltimore, and New Orleans.

About the middle of the present year, a few Jamaican firms made an experiment in direct shipment of bananas to Canada—(which accounts for the increase of the figures for 1922)—but the adverse conditions noted above, together with bad weather and an accident to the ship's machinery, prevented this venture from being a success.

Cocoa.—The total exports of this commodity in 1922 show a considerable increase over 1921, and a very large increase over 1920. Sales to Canada in 1921 and 1922, though but a small percentage of the gross amount in each case, were many times in excess of the 1920 figures.

Coconuts.—Here again a great increase is registered in exports to Canada; they rose from 682.300 nuts in 1920 to 1,401,039 in 1921, and 2,308,135 in 1922. A very gratifying result of the Jamaican exhibit at the Canadian National Exhibition was an increase of interest in coconuts on the part of Canadian importers, leading to the placing of several large orders with Jamaican growers.

Coffee.—As will be seen from the returns, this is one of the articles in which Canada is now Jamaica's principal customer. The decline in the percentage for 1921 is due to fairly large shipments having been made to Europe during that year, and indicates a slight temporary recovery in that market.

Ginger.—Jamaica's exports of ginger go mainly to the United Kingdom and the United States; in the latter country this product is extensively used in the manufacture of soft drinks and medicinal preparations. Except in 1921, when they rose to 17 per cent of the total, Canada's direct purchases were very small; but it is possible that a certain amount of Jamaican ginger may have been imported into the Dominion through the United States.

Goatskins and Hides.—No statistics of these products are available for 1922, except the total exports up to the 30th June, which are given. For some months past, no Jamaican hides or skins have been shipped either to Canada or the United States, owing to the prevalence of foot-and-mouth disease among Jamaican herds, necessitating embargoes on all animal products from the colony. The Canadian embargo took effect as from the 20th September last, and the American a short time previously; both are still in force. Although the Jamaica Government is doing its utmost to eradicate the disease, it seems fairly certain that a considerable time must elapse before the herds can be declared free of it.

In 1921, Canada's purchases of goatskins suffered a considerable decline, but there was a gain in hides. To appreciate this increase, it should be noted that a cow-hide weighs, on the average, 40 pounds when dried and 60 pounds

when wet. As the Customs returns do not differentiate these categories, an accurate comparison is impossible; but it is obvious, even supposing all the hides shipped in 1921 to have been dried, that Canada's purchases increased by some thousands of pounds. There were no exports under this head to the United States during 1921.

Grapefruit and Oranges.—Wide variations both in total exports and in exports to Canada are to be noted during the three years under review. In the present year Jamaica has experienced a fairly severe drought, which has reduced the output, particularly of oranges. These are not so carefully cultivated as grapefruit, and in addition have been severely affected by an insect pest known locally as "black blight." Thus there has been a phenomenal decline both in the total exports of oranges and in the shipments to Canada during 1922.

In the case of grapefruit, the decrease has not been so marked. The exports to Canada in 1922, though not much more than half of what they were in 1921, were more than double the 1920 figure; while the total exports, though showing a decline of over 800,000 fruit in 1922 as against the previous year's returns, were considerably in excess of the output for 1920.

It is evident that trade in citrus fruit between Jamaica and Canada offers opportunities for development. Broadly speaking, the Jamaican citrus trade is at present a sort of side-line of the banana corporations, who find their markets principally in England and the United States; but—as was noted in respect of bananas—improved shipping and distributing facilities should make the Canadian market more accessible to Jamaican growers.

Honey.—Canada is only a very small customer for this product, but there does not appear to be any good reason why she should not buy more from Jamaica, particularly as Jamaican honey entering Canada enjoys a preference of 1½ cents per pound in import duty. The fact that during the fiscal year 1920-21, 683,149 pounds of honey were imported into the Dominion, largely from sources outside the Empire, would seem to indicate an opportunity for Jamaican producers.

Orange Oil, Pimento and Cigars.—Of all these commodities, Canada is shown to have purchased comparatively small quantities during all three years; but it is not unlikely that, of the first two products, there were further importations by way of the United States, which would not be shown in the statistics.

In view of the high duty and the absence of a preference upon Jamaican cigars entering Canada, the opportunities for export business in this article do not appear promising; and with regard to rum, the restrictions upon the sale of liquor in Canada likewise render the Canadian market of little value to Jamaican distillers.

Sugar.—Though by no means so lucrative as bananas, in a normal year sugar must be adjudged the economic sheet-anchor of Jamaica, because of the infinitely superior quality which it offers. Sugar crops are not appreciably affected by any of nature's visitations save prolonged droughts; and it is very gratifying to note that the industry is recovering satisfactorily from the severe set-back which it experienced in consequence of the collapse of the world's markets during 1920 and 1921. About the middle of 1921, the Jamaica Government had to come to the aid of the sugar industry by guaranteeing repayment of loans to be made by the banks to the planters, not exceeding £400,000 in the aggregate, on the security of their estates and crops. Between May, 1921, and September, 1922, loans aggregating £394,240 were made, and repayments by borrowers during the same period amounted to £256,603, or nearly three-quarters of the total sum loaned. Impelled by this very creditable record, the Jamaica Legislative Council recently passed a resolution asking that this method of

financing be extended for a further period not exceeding three years; and although the Secretary of State for the Colonies had previously ruled that no further loans should be guaranteed by the Government, it is not improbable that, in view of the satisfactory results obtained, the Legislative Council's resolution will be acted upon. Although the days of huge fortunes from sugar are still very much below the horizon, and although there has been very little increase in the acreage under canes since 1920, the outlook is decidedly better than a year ago. Sugar prices have improved, and the industry now enjoys a welcome sense of security.

The statistics disclose the growing importance of the Canadian market to the Jamaican producer. In 1920, Canada took 45 per cent of Jamaica's total sugar exports; in 1921, on the average, 55 per cent; and in 1922, 74 per cent. In 1921, dark crystals, yellow crystals and muscovado were for the first time, in accordance with the requirements of the British Board of Trade, shown separately in the Customs returns; and it is significant that 201,322 cwt. of yellow crystals were shipped to Canada in that year, out of a total export to Canada of 292,872 cwt. of all grades. The bulk of these 201,322 cwt.—which were presumably above the 16 Dutch Standard in colour—no doubt went to the Canadian refiners, since light-coloured sugars sold for direct consumption in Canada pay considerably higher duties; but it is questionable whether this is so serious a hardship as is sometimes imagined, because of late years the Canadian demand for brown grocery centrifugal sugar has decreased, and this condition appears to be permanent. At any rate, the statistics show how groundless is the opinion, at one time freely expressed in Jamaica, that the operation of the 16 Dutch Standard Colour Test in Canada would compel Jamaican producers to manufacture only dark crystals, which would not command such good prices as yellow. From the 1921 figures, it appears that about five-sixths of the total volume exported were yellow crystals. The chief reason for this is that such sugars command a better price abroad; a secondary cause is the improvement, during recent years, of methods of manufacture in Jamaica, tending more and more to make muscovado a thing of the past. Although it is not at present possible to differentiate the various grades exported in 1922, it seems fairly certain that the percentage of yellow crystals for 1921 will be fully maintained. It is now recognized by the majority of intelligent Jamaicans that the increase in sugar exports to Canada is the direct outcome of the Canada-West Indies Trade Agreement of 1920.

Molasses.—No returns of this product are available for 1922. Normally, molasses is not an export of much consequence, since Jamaica does not produce molasses of the Barbados type. The comparatively high figures for 1920 are the result of a demand created during a period of inflation.

NORWAY'S TRADE IN PAINTS AND VARNISHES

Norway depends largely upon imports of paints and varnishes to cover its needs, says the United States *Commerce Reports.* The latest classified list of Norway's industries contains the names of some twenty manufacturers of paints, but most of the concerns are small and make no attempt to sell on a large scale. It may be assumed that the majority of them are engaged in the manufacture of composition paints for use in painting ships' bottoms. Latest production statistics are for 1916, and show the output of paint in Norway for that year to have been 64,745 kilos of ship composition and 550 litres of various mixed paints (kilo = 2·2046 pounds; litre = 0·26417 gallon). Conditions have altered since, however. A company at Fredrikstad has undertaken the manufacture on a large scale of a special white paint and will endeavour to market this product abroad. White titanium of domestic origin is the principal raw material used in its manufacture. The company is said to be trying to replace white lead and white zinc with its titanium white.

TRADE CONDITIONS IN SOUTH AFRICA

ASSISTANT TRADE COMMISSIONER J. CORMACK

Cape Town, December 14, 1922.—The Customs and Excise returns for September, which have just been issued, complete the record of South Africa's trade for nine months of this year, for which period the following are the comparative totals in values:—

	1922	1921
Imports	£34,502,189	£38,157,277
Exports	37,975,537	41,473,012

For the month of September, imports were valued at £4,435,421, as compared with £3,933,351 for September, 1921. In August of this year, the total value was £4,190,939.

In the nine months 1,256,670 pairs of boots and shoes have been imported, but the September figures in contrast to those of August show a decline. Of automobiles, there have been imported 3,295 for this period, as against 1,438 in 1921. In agricultural implements and machinery the market was fairly active during November. There was a considerable demand for fencing material (stocks of fencing wire reported low). As respects mining materials, a slightly more optimistic feeling is apparent on the Commercial Exchange, though business is still very quiet. The mines have been buying a little more freely lately, and this is regarded as an indication of better business in the near future. Prices show little change, though there are some indications of a slightly firmer tendency. In iron and steel business still remains unsatisfactory as regards volume, but prices show a tendency to firm up, and it is anticipated that by the end of the year an improvement will be observed.

The building trade makes consistent progress, and more activity is now reported from the smaller towns. Notwithstanding the heavy demands, stocks are well maintained while prices remain firm.

There has been a falling off in country orders, and inquiries for electrical goods and business has been quieter. Local prices are practically unchanged, but a firmer tendency is apparent in quotations from England, Germany, and the United States, particularly the last mentioned. In hardware and cutlery business continues on most restricted lines, and prices remain firm. Trade in boots and shoes, unless in the Port Elizabeth district, is reported to be very fair, though there is considerable apprehension as to future prospects.

There is a good demand for Western Province wheat at Cape Town, and old season's wheat is now unprocurable. Stocks of flour at East London are very low and quantities arriving are small. Durban reports that flour has kept very firm and c.i.f. quotations of both Australian and Canadian have advanced, although the local market has not fully responded.

The Transvaal gold output for October has been declared by the Transvaal Chamber of Mines at 778,159 ounces valued at £3,579,531 on the basis of £4 12s. per ounce. The output for September was 747,089 ounces valued at £3,473,964, the basis of valuation having been £4 13s. per ounce. The increase of 31,070 ounces over the September output is remarkable in that the actual number of working days in each month was the same, and this satisfactory result must be regarded as due to a further increase in efficiency in the mines coupled with an adequate supply of native labour. That the improvement is general is proved by the fact that of the thirty-nine producing properties on the Witwatersrand, three only failed to show increased returns.

SITUATION IN UNITED STATES TEXTILE INDUSTRY

FREDERICK H. PALMER, ASSISTANT TRADE COMMISSIONER IN THE UNITED STATES

New York City, January 19, 1923.—Conditions in practically all branches of the dry goods industry in the United States are stronger and sounder than in many years, and most of the mills are running close to capacity, with enough forward business to keep them occupied until April or later. In this connection it is to be observed that there are no longer any heavy unwieldy stocks to cause undue concern; rather is there an actual scarcity in many lines for immediate delivery. This situation is a result of the thorough disposal of surplus textiles, while at the same time production had been kept under order.

Recent reports are to the effect that although exceptionally large quantities of textiles have been contracted for for delivery before July, indications are that the merchants have by no means adequately covered their probable requirements for that period. In view of the buying policy of the past year and the resultant curtailment of production, prices, though firmly established, are high, but nothing in the present situation points to lower levels. On the contrary, rising tendencies are still in evidence.

Although 1922 was a much better year than those in the trade expected it would be, it was one of the most eventful and trying years ever experienced, since when the possible effects on an industry of a strike such as the New England textile workers' strike (which entailed a loss in production equivalent to more than 400,000,000 yards of cloth), of the coal and rail strikes, tariff uncertainties, and of buyers' vicissitudes, all in the face of rising raw material markets, are considered, the tremendous difficulties that confronted the textile manufacturers throughout the greater part of the year can readily be appreciated.

It has already been intimated that the outlook for the first half of this year is considered bright and encouraging, but no one is likely to venture a prediction concerning the last six months. Conditions that will control the situation then will be dependent to a large degree upon developments in the labour situation, the supply of raw materials, legislation, a definite solution of the European problem, and lastly, upon the attitude of consumers towards the higher prices which manufacturers must inevitably be forced to ask for all textiles as a result of those conditions at present existing.

BELGIAN INDUSTRIAL, COMMERCIAL AND FINANCIAL CONDITIONS

TRADE COMMISSIONER A. S. BLEAKNEY

Brussels, January 4, 1923.—The industrial situation is always quiet at this period of the year. The metallurgical industry registers no change, except that the price of coke has risen from 120 to 180 francs. The steel market is uncertain; the glass industry still maintains its satisfactory position; the pottery industry, which for a long time has been practically at a standstill, is now showing signs of improvement, many orders having been received during the last few weeks; and the construction trades continue to show great activity.

The situation is steadily improving in the labour market. At the time of writing an increase in wages has been admitted in principle by the larger steelworks. The question of a partial suspension of the eight hours law is also being considered.

TRADE RETURNS

The Ministry of Finance has just issued the trade returns for the first nine months of 1922. The total importations were 15,164,872 metric tons, an increase over last year of 2,208,673 tons. The value of these importations was

6,430,665,000 francs, a drop from the last year's values of 1,298,272,000 francs. The lower cost of raw materials on the one side and increased industrial activity on the other are credited with this movement of trade. Countries supplying Belgium in order of importance on the basis of quantity were France, Germany, Britain, Holland, United States. United States exports fell from 1,084,428 tons for the first nine months last year to 671,222 tons for the corresponding period in 1922.

Exports have diminished in quantity by 1,223,461 tons, and in value by 1,142,523,000 francs. This is attributed to low exchange competition, high wages and the eight-hour day. The drop was not in manufactured goods, however, but in food products, wines and raw materials. The unfavourable balance was 10,735,246,000 francs as compared with 13,176,041 last year. France, Holland, Germany, Britain, and the United States, in the order named, are the principal countries of destination, as regards quantities, for Belgian exports.

FINANCE

The situation of the Bourse in December was one of great uncertainty owing to the difficult international situation. Business has been quiet in iron, coal, zinc and textile shares, but glass and colonials have been active. A new company has been formed to assume control of Mexican Tramways and to acquire an interest in Barcelona Traction. The capital will be 50 million francs. The discount rates of the National Bank of Belgium on the 21st of December, 1922, were 4½ per cent for accepted bills and 5 per cent for non-accepted bills and promissory notes. The interest rate on advances and loans on Belgian public funds was 5½ per cent.

THE IMPORT TRADE OF CHILE

Trade Commissioner B. S. Webb

[*This is the third of a series of reports on the Markets of Chile. The first, which dealt with textiles, agricultural machinery and implements, and iron and steel products, was published in No. 989; the second, on transportation material, industrial machinery and supplies, tools and hardware, appeared in the last issue (No. 990).*]

CHEMICALS AND DRUGS

Under the classification of "chemicals and drugs" goods were brought in during the year 1920 to the value of $17,433,000 Canadian. The classification includes such commodities as paints, polishes, explosives, etc., the value of the importations under the respective heads being as follows: pastes, $6,850,000 Canadian; drugs and perfumes, $2,842,333; paints, $2,161,333; chemicals, $1,921,000; industrial chemicals, $1,705,666; explosives, $1,503,000; soap, $433,000; artificial manures, $3,000.

The United States supplied the larger part of the Republic's requirements under these several heads, importation from that country being valued at $8,330,000 as compared with $3,330,000 from the United Kingdom, $1,200,000 from France, and $700,000 from Norway and Germany respectively.

Caustic soda.—The largest single item of importation amongst industrial chemicals relates to caustic soda, of which 1,296 tons were imported during the year; three-fourths of this quantity came from the United Kingdom, the largest part of which was of the well-known Brunner Mond manufacture. Imports from the United States amounted to 368 tons, and 32 tons were from Japan. Caustic soda 70-72 degrees pure is imported in drums of 50 kg. and is also being manufactured locally on a small scale. It is used in the industries and for the making of common soap.

Calcium carbide.—Chile is a large consumer of calcium carbide, 5,362 tons having been imported during 1920. It is used for welding, for lighting on the State railways, and for street lighting in some of the towns of the southern districts. It is imported in iron drums with wooden covers of a gross weight of 112 kg. and a net weight of 110 kg. The size principally sold in the south of the Republic is 25 by 50 mm., whilst in the northern province 50 by 80 mm. is the size most in demand. The Chilian Government is anxious that calcium carbide should be made in the Republic and is offering a high premium to whoever will produce it locally, and in addition will undertake to increase the duties on imported calcium carbide as soon as it is made locally on a commercial scale. There are rich limestone deposits in the southern and in the central districts of the Republic, but it appears that coke made from Chilian coal is not suitable for the manufacture of calcium carbide. Imports by countries during the year were as follows: Norway, 3,352 tons; Sweden, 1,442 tons; United States, 283; Holland, 217; Great Britain, 34 tons, and Denmark, 34 tons.

Paints.—Stiff paints, white and coloured, are imported in large quantities, total imports amounting to 2,470 tons, of which 1,986 tons came from Great Britain and 460 tons from the United States. Amongst the British marks those of Messrs. W. H. Clark and Messrs. Blundel Spencer are prominent in Chile. The paint trade is a seasonable one, the paint being sold for arrival in June. A certain amount of white lead is being ground in oil in local factories, but the quality of this paint is not equal to that of the imported. Stiff paints are usually imported in drums of 11 kg. weight.

Prepared paints are imported to a limited extent only, and the trade in this article is almost entirely in British hands. Japalac, chinamel, etc., are seen on sale, but imports from the United States amounted to only 76 tons as compared with 243 tons from the United Kingdom. Prepared paints are usually sold in 1 and 2-pound tins, the sale for the 7 and 28-pound tins being very limited.

Varnishes.—Varnishes of all kinds, flatting, carriage, etc., are imported principally from the United States in gallon and half-gallon tins. Of the 172 tons imported during the year, 116 were from the United States, 49 from the United Kingdom, and 4 from Germany.

White lead.—The importation of white lead is on surprisingly small scale. White zinc is preferred because white lead is considered to be susceptible to adulteration by the addition of talcum, whiting, etc., whereas any adulteration of white zinc would be disclosed by the colour. Speaking of the preference for zinc white, a railway engineer advises that posts and outside woodwork stand the six months' hot sunshine and are better preserved when painted with zinc white than when white lead is used. The imports of white lead only amount to 10 tons, 6 of which came from the United States and 4 from Great Britain.

Zinc white.—Imports by countries: United States, 85 tons; Sweden, 16 tons; Belgium, 13 tons; Great Britain, 11 tons, and Germany, 10 tons; all countries, 144 tons. Zinc white is imported in drums of 11 kg., and is also made to a certain limited extent locally, by galvanization.

Acetic acid is imported in the Republic on a comparatively small scale, the imports for the year having amounted to 50 tons, 80 per cent of which came from the United States.

ELECTRICAL GOODS

Imports of electrical goods during the year 1920 were valued at $2,021,663, made up as follows: lighting, $296,333; dynamos, $294,333; filament lamps, $242,333; insulated cable, $227,333; material not specified, $226,000; telephone apparatus, $143,000; dry cell and batteries, $132,666; insulated wire, $129,000;

current meters, $112,000; porcelain insulators, $82,666; telegraph instruments, $62,333; arc lamps, $36,333; carbons $21,600; ventilators, $10,000; and insulating tubes, $6,333.

United States manufacturers supplied most of the requirements in electrical goods. Imports from that country were of the value of $830,000 in 1920, whilst imports from Germany and Great Britain were valued at $501,666 and $382,000 respectively.

FOOTWEAR

Boots and shoes, men's.—There are very few opportunities for Canadian manufacturers in this line, and imports are steadily on the decline. This is due partly to the high rate of duty, amounting to 9 Chilian pesos per pair, but principally to the fact that boots and shoes of a very good quality are made locally at prices with which the foreign article cannot compete; in fact, a good pair of imported boots cannot be sold for less than 100 Chilian paper pesos, whereas a local article, of practically the same quality, can be sold retail for from 30 to 50 pesos. The boot and shoe industry is one of the few in which Chile has already established an export trade of her own, and she manufactures in fair quantities for both the Argentina and Peruvian markets. Of the total imports of 19,801 pairs, the United States provided 13,643 pairs, the United Kingdom 3,345 pairs, and France 2,300 pairs, the remainder, in negligible quantities, coming from Germany and the Argentine Republic.

Boots and shoes, ladies'.—The high quality of the local product prevents any serious competition from foreign sources. Of the 9,636 pairs imported during the year, 4,249 pairs came from the United States, 3,239 from the United Kingdom, 1,360 from Switzerland, and 788 from Italy.

Rubber overshoes.—There is a fairly large import of these goods, and the market appears to be worth investigating on the part of Canadian exporters. The usual styles such as are in common use in Canada are quite satisfactory for the Chilian market, and no special designs are required. Of the total imports of 34,361 pairs, 32,684 came from the United States, 1,264 from the United Kingdom, and 413 from Argentina. The Goodyear brand appears to be the most popular, and this may be due to the facilities for distribution which this company possesses in the Panama Canal zone; the Dunlop overshoe is also frequently seen, and enjoys a good reputation.

MISCELLANEOUS

Roofing felts.—The total quantity imported during the year amounted to 113,399 kg., of which 111,013 kg. came from the United States, which thus enjoys a monopoly of the trade. Roofing felts are sold by practically all merchant houses, Certain-teed, Ruberoid, and other well-known American brands being in large demand. The material is packed in the usual rolls 36 inches wide, a roll containing 500 square feet. No special precautions are necessary for the Chilian market. In view of the development of the industry in Canada, more especially on the Pacific Coast, there appears a good opportunity here for the extension of Canadian trade, especially as investigations have already shown that the Dominion can supply at a competitive price in South American countries.

Stoves and ranges.—On account of the semi-tropical climate, there is not likely to be any large demand for heating stoves such as are so popular in Canada. There is, however, a substantial demand for cooking stoves, especially in the cities, and this demand is likely to increase as the development of the country on modern lines proceeds. With regard to the type of range required, gas cooking is popular in the larger centres of population, and there

is also a demand for a simple and cheap type of gasolene or oil stove for use in the country districts and the outlying portions of the cities to which gas mains have not yet been laid. The peon or labouring classes of the population do not use imported stoves, a simple brazier being usually all that they can afford. The total imports for 1920 amounted to 268,878 kg. in weight, of which the United States supplied 40 per cent, Germany 35 per cent, and the United Kingdom 22 per cent.

Optical goods.—There is not a large import of this class of manufactured goods; the total value in 1920 amounted to only $36,400 or, say, $12,000 Canadian currency. The United States supplies practically half of the imports, France, Germany, and the United Kingdom supplying the balance in the order named.

Spectacles and lenses.—The imports of these goods amounted in value to 69,400 pesos (say $23,000 Canadian currency) for 1920, of which two-thirds came from the United States, 15 per cent from France, and the balance from Japan, Germany, and the United Kingdom. The market does not offer any great opportunities for Canadian manufacturers, as a well-known United States firm maintains a large warehouse on the Isthmus, which is designed to take care of South and Central American trade. French goods are considered of high quality, and Japan maintains her position through the cheapness of her product, although the quality is considered inferior. Germany is making an effort to increase her sales in this market, but so far the results as shown by statistics do not warrant any great belief in her ultimate success.

Jewellery.—The demand for cheap jewellery in Chile is much in excess of what would be expected from the general standard of living of the poorer classes. The peon's love of ornament and colour, however, is well known, and another factor which influences the importation of this class of article is the demand for elaborate, if inferior, ecclesiastical and devotional ornaments. Gold ornaments such as rings, brooches, bracelets, etc., are popular amongst the women of the country, and there is a large demand for these articles made in 9-carat gold, or even under; gold rolled and gold washed goods are also in demand, and jewellery made of imitation platinum is also a good seller. Imitation gems are also popular when mounted in attractive settings, and many of these are an excellent imitation of the genuine stones. The imports for 1920 amounted to 340,300 pesos, or about $113,430 Canadian currency, of which the United States supplied $53,966 and Germany $41,933. France, which supplies high-class articles for the use of the wealthier portion of the population, exported jewellery to the value of $6,000, and the balance came from the United Kingdom.

EXHIBITION AND SALES ROOM IN SHANGHAI

As has recently been announced in the *Commercial Intelligence Journal*, the Department of Trade and Commerce has arranged through its Trade Commissioner in Shanghai, Dr. J. W. Ross, to open an exhibition and sales room in that city in the interests of Canadian manufacturers and exporters. Dr. Ross advises that he has secured a most desirable location on the ground floor of Messrs. Jardine & Matheson's new building at the corner of the Bund and Peking road, in the most public part of the city. Canadian firms who so desire may sublease space, making their own arrangements for sales representatives, who at all times will have access to the exhibition. The exhibition and sales room is of course limited strictly to samples of goods manufactured or produced in Canada.

Information as to space, rates, etc., will be furnished upon application to the Department of Trade and Commerce, Ottawa.

TENDERS INVITED

New Zealand

Auckland, December 18, 1922.—Copies of plans and specifications have been received from Mr. W. A. Beddoe, Canadian Trade Commissioner, Auckland, for equipment for the Public Works Tenders Board and the Post and Telegraph Department, Wellington. These plans and specifications are open for inspection at the Commercial Intelligence Branch of the Trade and Commerce Department, Ottawa. Tenders should be addressed to the Secretary, Public Works Supplies and Tenders Committee, Wellington, and the Stores Manager, Post and Telegraph Department, Wellington, in accordance with these specifications.

No.	Date of Closing	Particulars
S.M. [illegible]	Mar. 20, 1923.	*Mangahao Power Scheme.*—Section 73; 400 miles, equivalent to 1,047,600 pounds of bare copper wire; size of wire—19/13 S.W.G.; Maximum resistance per mile at 60° F.—0.348 ohm.; weight per mile—2,619 pounds; minimum breaking strength in tension, 7,500 pounds.
C.S. [illegible]	Mar. 5, 1923.	*Post and Telegraph Department.*—5,000 cords, microtelephone, 4-conductor, mounted to specification and drawings; 2,000 cords, switchboard, mounted Ericsson standard type, to specification and drawing and sample; 6,100 cords, switchboard, 2-conductor, to specification and drawings and sample; 3,000 cords, switchboard, 3-conductor, to specification, drawing and sample; 1,000 cords, telephone, 2-conductor to specification and drawing; 1,000 cords, telephone, 3 conductor, to specification and drawing; 1,000 cords, mounted, 2 conductor, to specification and drawing; 500 cords for receivers, 2 conductor to specification and drawings.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING JANUARY 23, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement on the nominal closing quotations for all the principal exchanges for the week ending January 23, 1923. Those for the week ending January 16 are also given for the sake of comparison.

		Parity	Week ending Jan. 9, 1923.	Week ending Jan. 16, 1923.
Britain .. ..£	1.00	$4.86	$4.7032	$4.7038
France .. ..Fr.	1.	.193	.0690	.0658
Italy .. ..Lire	1.	.193	.0494	.0482
Holland .. ..Florin	1.	.402	.3999	.3994
Belgium .. ..Fr.	1.	.193	.0629	.0585
Spain.. .. .. Pes.	1.	.193	.1575	.1580
Portugal .. ..Esc.	1.	1.08	.0504	.0479
Switzerland.. .. .. Fr.	1.	.193	.1898	.1883
Germany .. .. Mk.	1.	.238	.000065	.000052
Greece .. .. Dr.	1.	.193	.0136	.0131
Norway .. .. Kr.	1.	.268	.1880	.1885
Sweden .. ..Kr.	1.	.268	.2717	.2713
Denmark .. .. Kr.	1.	.268	.1991	.1969
Japan .. ..Yen	1.	.498	.4935	.4934
India .. .. R.	1.	2s.	.3201	.3344
United States .. ..$	1.	$1.00	1.0087	1.0096
Mexico .. ..$	1.	.498	.4953	.4967
Argentina .. ..Pes.	1.	.424	.3794	.3761
Brazil .. .. Mil.	1.	.324	.1172	.1161
Roumania .. .. Lei	1.	.198	....	....
Jamaica .. ..£	1.	4.86	4.7169	4.7150
British Guiana .. ..$	1.	1.		
Barbados .. ..$	1.	1.		
Trinidad .. ..$	1.	1.		
Dominica.. .. ..$	1.	1.		
Grenada .. ..$	1.	1.	.9838—.9838	.9863—.9863
St. Kitts .. ..$	1.	1.		
St. Lucia.. .. ..$	1.	1.		
St. Vincent .. ..$	1.	1.		
Tobago .. ..$	1.	1.		
Shanghai, China .. ..Tael	1.	.708	.7393	.7408
Batavia, Java .. .. Guilder	1.	.402	.3958	.3937
Singapore, Straits Settlements .. $	1.	.567	.5546	.5553

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "THE COMMERCIAL INTELLIGENCE BRANCH OF THE DEPARTMENT OF TRADE AND COMMERCE, OTTAWA," OR THE BOARDS OF TRADE AT ST. JOHN, HALIFAX, SHERBROOKE, MONTREAL, PETERBOROUGH, TORONTO, WOODSTOCK, ST. MARY'S (ONT.), WINNIPEG AND VANCOUVER; THE CHAMBERS OF COMMERCE AT HAMILTON, ST. CATHARINES, STRATFORD, BRANTFORD, LONDON, AND VICTORIA (B.C.); BORDER CHAMBER OF COMMERCE, WINDSOR; THE CANADIAN MANUFACTURERS' ASSOCIATION OFFICES AT TORONTO, MONTREAL, WINNIPEG, VANCOUVER AND VICTORIA; AND THE KITCHENER AND WATERLOO MANUFACTURERS' ASSOCIATION, KITCHENER, (ONT.).

Foodstuffs

1172. TROPICAL PRODUCTS.—A firm of commission agents in Genoa, Italy, desire quotations on tropical products, i.e., sugar, coffee, tea, spices, etc.

1173. TROPICAL PRODUCTS.—A firm in Naples doing business on a cash basis or against opening of credit are desirous of securing tropical products such as spices, coffee, sugar, tea, etc.

1174. CHOCOLATE CONFECTIONERY OF ALL DESCRIPTIONS.—A firm in Johannesburg, Transvaal, would like to represent Canadian manufacturers of chocolate confectionery of all descriptions.

1175. RED SALMON.—A Rotterdam firm desire red salmon, canned.

1176. BUTTER AND CHEESE.—A prominent Bristol firm desire to act as agents for butter and cheese exporters, and particularly desire to re-open connection with a good Montreal firm.

1177. BACON.—A Bristol firm of shippers' agents desire to represent a Canadian packing house.

1178. WHEAT AND OTHER GRAIN.—A Genoa firm would like to get into touch with Canadian exporters of wheat and other grain seeking representation in Italy.

1179. HAY.—A firm in the south of England ask to be placed in touch with Canadian exporters of hay.

Miscellaneous

1180. TEXTILE MACHINERY AND ACCESSORIES.—A Japanese firm in Osaka desire to import spinning and weaving machinery and accessories from Canada; also are anxious to import any newly invented machinery of the above classification.

1181. TUBULAR WHEELBARROWS.—A London firm of indent merchants have an enquiry from South Africa for tubular wheelbarrows (weighing 63 pounds each packed 12 in a bundle) and desire quotations from Canadian manufacturers f.o.b. Canada-Cape Line. Further particulars in the possession of the Department of Trade and Commerce, Ottawa.

1182. DOWELS.—A London firm of timber merchants are open to purchase best quality dowels, and invite quotations c.i.f. London from Canadian manufacturers. Specifications may be obtained from the Department of Trade and Commerce.

1183. DOWELS, DECK CHAIR STOCK, DOORS AND HANDLES.—A London firm are desirous of securing the representation of Canadian manufacturers of dowels, deck chair stock, doors and handles, seeking business in Great Britain.

1184. FOODSTUFFS OF ALL KINDS AND DRY GOODS.—A shipping and confirming house in Johannesburg, Transvaal, would like the agency for Canadian foodstuffs of all kinds and dry goods.

SAILINGS FROM VANCOUVER TO MEXICAN, CENTRAL AND SOUTH AMERICAN PORTS

Messrs. Avery-Kernahan Limited, Vancouver, write that on March 1 they will assume the steamship agency for British Columbia for the Latin-America Line. One sailing a month will be given to Central American and Mexican ports, and approximately one sailing a month to the West Coast of South America, and it is desired, in order to encourage this fleet, which is serving markets somewhat new to the Canadian exporter, to obtain for each sailing a minimum of not less than 300 tons of freight. The fleet consists of the ss. *Remus* (capacity 7,300 d.w. tons), *Romulus* (7,000), *Regulus* (6,000), *Baja California* (2,550), and *Sinalda* (2,550 d.w. tons). The ports served are as follows: in Mexico, Mazatlan, San Blas, Manzanillo, Acapulco, Salina Cruz; in Guatemala, Champerico, Guatemala City, San Jose de Guarenala; in Salvador, Acajutla, La Libertad, San Salvador, La Union; in Honduras, Amapala; in Nicaragua, Corinto, San Juan del Sur; in Costa Rica, Puntarenas; in Canal Zone, Balboa; in Colombia, Buenaventura; in Ecuador, Guayaquil; in Peru, Talara, Paita, Salaverry, Callao, Lima, Mollendo; in Chile, Arica, Iquique, Antofagasta, Valparaiso.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From Halifax

To LIVERPOOL.—Ausonia, Cunard-Anchor-Donaldson Line, Jan. 29; Andania, Cunard-Anchor-Donaldson Line, Feb 12; Canada, White Star-Dominion Line, Feb. 25.

To LONDONDERRY AND GLASGOW.—Assyria, Cunard-Anchor-Donaldson Line, Jan. 29.

To PLYMOUTH, CHERBOURG, AND LONDON.—Antonia, Cunard-Anchor-Donaldson Line, Feb. 3.

To NEWFOUNDLAND.—Canadian Sapper, Canadian Government Merchant Marine, Feb. 7.

To BERMUDA, BARBADOS, TRINIDAD, AND DEMERARA.—Royal Mail Steam Packet Co.'s ships, Feb. 2, and every fortnight thereafter.

To BARBADOS, TRINIDAD, AND DEMERARA.—Canadian Logger, Canadian Government Merchant Marine, Feb. 10.

To SANTIAGO (CUBA), KINGSTON, MONTEGO BAY AND ST. ANN'S BAY (JAMAICA).—Andalusia, Pickford & Black, Jan. 31 and Feb. 28.

To HAMILTON (BERMUDA), NASSAU (BAHAMAS), KINGSTON (JAMAICA), AND BELIZE (BRITISH HONDURAS).—Canadian Forester, Canadian Government Merchant Marine, Feb. 8

To GUANTANAMO, SANTIAGO (CUBA), AND KINGSTON, (JAMAICA).—Ottar, Pickford & Black, Feb. 14.

To AUSTRALIA AND NEW ZEALAND.—Canadian Seigneur, Canadian Government Merchant Marine, Ltd., Feb. 20.

From North Sydney

To ST. JOHN'S (NFLD.).—Kyle, Reid-Newfoundland Co., Tuesday, Thursday and Saturday every week; Sable I., Farquhar Steamship Co., every Saturday.

From St. John

To LONDON.—Dunbridge, Canadian Pacific Steamships, Ltd., Jan. 30; Bosworth, Canadian Pacific Steamships, Ltd., Jan. 31; Lexington, Furness Line, Feb. 6; Canadian Leader, Canadian Government Merchant Marine, Ltd., Feb. 7; Holbrook, Canadian Pacific Steamships, Ltd., Feb. 10; Brant County, I. C. Transports Ltd., Feb. 15.

To MANCHESTER (via HALIFAX).—Manchester Brigade, Furness, Withy & Co., Ltd., Feb.

1; Manchester Producer, Manchester Line, Feb. 15; Manchester Regiment, Manchester Line, Feb. 24.

To Liverpool.—Marloch, Canadian Pacific Steamships, Ltd., Feb. 2; Montcalm, Canadian Pacific Steamships, Ltd., Feb. 9; Marburn, Canadian Pacific Steamships, Ltd., Feb. 16; Canadian Miller, Canadian Government Merchant Marine, Ltd., Feb. 20.

To Glasgow.—Methven, Canadian Pacific Steamships, Ltd., Feb. 10; Canadian Voyager, Canadian Government Merchant Marine, Ltd., Feb. 15; Marburn, Canadian Pacific Steamships, Ltd., Feb. 16 (via Liverpool).

To Cardiff and Swansea.—Canadian Otter, Canadian Government Merchant Marine, Jan. 31.

To Hull (via Halifax).—Lexington, Furness Line, Feb. 3.

To Southampton, and Hamburg.—Melita, Canadian Pacific Steamships, Ltd., Feb. 10.

To Belfast.—Ballygally Head, Head Line, Feb. 4; Melmore Head, Head Line, Feb. 25.

To Dublin.—Ballygally Head, Head Line, Feb. 4; Melmore Head, Head Line, Feb. 25.

To Avonmouth.—Methven, Canadian Pacific Steamships, Ltd., Feb. 10.

To Antwerp.—Bosworth, Canadian Pacific Steamships, Ltd., Jan. 31.

To Rotterdam and London.—Brant County, I.C. Transports, Ltd., Feb. 15.

To Rotterdam and Hamburg.—Dunaff Head, Head Line, Feb. 11.

To Bermuda, Barbados, Trinidad and Demerara.—Mattawa, Canadian Pacific Steamships, Ltd., Jan. 27; Montezuma, Canadian Pacific Steamships, Ltd., Feb. 10.

To Havre and Hamburg.—Hastings County, I.C. Transports, Ltd., Feb. 10; Hoorda, I.C. Transports, Feb. 24.

To Australia and New Zealand.—Erroll, New Zealand Shipping Co., Feb. 20.

To Near East, India, and Java.—A steamer, Ellerman-Bucknalls, January.

From Vancouver

To Honolulu, Suva, Auckland, and Sydney.—Makura, Canadian-Australasian Royal Mail Line, Feb. 23.

To Yokohama, Kobe, Nagasaki, Shanghai, Manila and Hong Kong.—Empress of Asia, Canadian Pacific Steamships Ltd., Feb. 22.

To Yokohama, Kobe, Shanghai and Hong Kong.—Arabia Maru, Osaka, Shosen Kaisha, Feb. 17.

To Yokohama and Kobe.—Hakata Maru, Nippon Yusen Kaisha, Jan. 31; Tokiwa Maru, Nippon Yusen Kaisha, Feb. 20.

To Yokohama, Kobe, Manila and Hong Kong.—Tyndareus, Blue Funnel Line, Feb. 17.

To Australasian Ports.—Canadian Transporter, Canadian Government Merchant Marine, Feb. 6.

To Auckland, Melbourne, Adelaide, and Sydney.—Hauraki, Canadian-Australasian Royal Mail Line, Feb. 10.

To the Orient.—Canadian Prospector, Canadian Government Merchant Marine, Feb. 12.

To London and Liverpool.—Electrician, Harrison Direct Line, Feb. 2; Dramatist, Harrison Direct Line, late February.

To London, Rotterdam, Hamburg, and Antwerp.—Kinderdyk, Royal Mail Steam Packet Co., end January.

To Sydney.—Waihemo, Canadian-Australasian Royal Mail Line, Feb. 10.

To Wellington, Melbourne, Adelaide and Sydney.—Waiotapu, Canadian-Australasian Royal Mail Line, about Feb. 10.

To Yokohama, Kobe, Moji, Darien, Shanghai and Hong Kong.—Arabia Maru, Osaka Shosen Kaisha, Feb. 14; Arizona Maru, Osaka Shosen Kaisha, Feb. 18.

To Yokohama, Kobe, Moji, Shanghai and Manila.—Manila Maru, Osaka Shosen Kaisha, Feb. 27.

To Vancouver, Kobe, Shanghai, Hong Kong and Singapore.—Grace Dollar, Canadian Robert Dollar Line, Feb. 2.

LIST OF ACTS ADMINISTERED AND PUBLICATIONS ISSUED BY THE DEPARTMENT OF TRADE AND COMMERCE

Copyrights Act (a). Cullers Act. Electricity and Fluid Exportation Act (b). Electricity Inspection Act (b). Electric Units Act (b). Gas Inspection Act (b). Gold and Silver Marking Act. Grain Act. Inspection and Sale Act. Inspection of Water Meters Act (d). Lead Bounties Act. Patent Act (a). Petroleum Bounty Act. Statistics Act (c). Trade Mark and Design Act (a). Timber Marking Act (a). Weights and Measures Inspection Act (d). Zinc Bounties Act.

MISCELLANEOUS

Annual Report of the Department of Trade and Commerce.
Annual Report of Board of Grain Commissioners for Canada.
Annual Report *re* Mail Subsidies and Steamship Subvention.
List of Licensed Elevators, etc.
Patent Office Record (Weekly) (a).
Annual Report of Weights and Measures, Electricity and Gas (d).
Dominion Grain Research Laboratory (1920).
Grain Inspection in Canada (1914).
Rules and Forms of the Canadian Patent Office (a).
Rules and Regulations made by the Board of Grain Commissioners.
Trial Shipments of Wheat from Vancouver via the Panama Canal to the United Kingdom (1918). (Out of print).

PUBLICATIONS OF THE COMMERCIAL INTELLIGENCE SERVICE (e).

Commercial Intelligence Journal, containing Reports of Trade Commissioners and other Commercial Information.
Apple Market Conditions: Reports from the Canadian Fruit Trade Commissioner at Liverpool (periodically).
Canada-West Indies Conference (1920).
Canadian Economic Commission to Siberia (1919).
Fruit Production in Australia (1922).
German War and Its Relation to Canadian Trade (1914).
Indian Empire as a Market for Canadian Products (1922). (Price outside Canada, 35 cents.)
Mexico as a Field for Exports (1921). (Price outside Canada, 35 cents.)
Markets of Jamaica and the Republic of Colombia, Venezuela, and Panama (1922). (Price outside Canada, 35 cents).
Packing for Overseas Markets (1922). (Price outside Canada, 35 cents.)
Report of Special Trade Commission to Great Britain, France and Italy. (French and English) (1916).
Russian Trade (1916).
Tariffs of the British West Indies (in leaflets).
Trade after the War (1916).
Timber Import Trade of Australia (1917).
Trade between Canada and the British West India Colonies (1920).
Trade of the New Countries of South-east Europe (1921). (Price outside Canada, 35 cents.)
Trading Opportunities in Scandinavia (1922). (Price outside Canada, 35 cents.)
Trading with Egypt (1921). (Price outside Canada, 35 cents.)
Trade with Greece (1921).
Trade with South China (1918).
Trading with Spain (1920).
Trading with Switzerland (1922). (Price outside Canada, 35 cents.)
Toy Making in Canada (1916).
West Africa and Its Opportunities for Canadian Trade (1921). (Price outside Canada, 35 cents.)

PUBLICATIONS OF THE BUREAU OF STATISTICS

The following is an abbreviated list of publications of the Bureau of Statistics. For a complete list, see note (c).
Census of Canada (1911). VI Vols., Bulletins, etc.
Census of Prairie Provinces (1916).
Miscellaneous Statistics respecting the following: Criminal; Education; Finance (Provincial and Municipal); Transportation, including railways and tramways, express, telegraphs, telephones, water, etc.; Production, including agriculture, furs, fisheries, forestry, mining and manufactures; Vital (annual and monthly).
Year Book of Canada.
Report of the Dominion Statistician, Annual.
Trade of Canada (Imports and Exports), Annual and Monthly.
Trade (Internal), including grain, livestock, coal, prices, etc.

NOTE.—(a) Applications should be addressed to: Commissioner of Patents, Ottawa. (b) Applications should be addressed to Director Gas and Electricity Inspection Service, Ottawa. (c) Applications should be addressed to: Dominion Statistician, Ottawa. (d) Applications should be addressed to: Director Weights and Measures Service, Ottawa. (e) Applications should be addressed to the Director, Commercial Intelligence Service, Ottawa.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 248 St. James street, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic.

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address, Canadian.*

Australia.

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium.

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil.

Major E. L. McColl. Address for letters—Caixa (P.O. Box) 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies.

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China.

J. W. Ross, Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba.

Address: 400 and 401 Teniente Rey 11, Havana. (Post-office Box 1290.) *Cable Address, Cantracom.*

France.

Lieut-Col. Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany.

L. D. Wilgress, Care British Consulate-General, Hamburg. (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland.

Norman D. Johnston, Zuidblaak 26, Rotterdam. *Cable Address, Watermill.*

India and Ceylon.

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy.

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica.

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan.

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico.

C. Noel Wilde, Care British Consulate-General, Mexico City.

New Zealand.

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa.

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements.

P. W. Ward, P.O. Box 121, Singapore. (Territory covers Straits Settlements, British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

A. B. Muddiman, Sun Building, Clare Street, Bristol. *Cable Address, Canadian.*

Major Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States.

Frederic Hudd, 44 Whitehall Street, New York City. *Cable Address, Cantracom.*

CANADIAN COMMERCIAL AGENTS

Australia.

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark.

C. E. Sontum, Grubbegd, No. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies.

R. H. Curry, Nassau, Bahamas.

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

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DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
Hon. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

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TABLE OF CONTENTS

Commercial Intelligence Journal

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INDEX TO THE "COMMERCIAL INTELLIGENCE JOURNAL"

The index to the *Commercial Intelligence Journal* for the six months ended December 30, 1922, is being sent out with this issue. Canadian manufacturers and exporters are strongly advised to file all numbers of the *Commercial Intelligence Journal* for future reference, and to preserve them, with the index, in bound volumes, or in some other convenient form. Back numbers (with the exception of those which may be out of print), as well as additional copies of the index, may be had free of charge on application to the Director, Commercial Intelligence Service, Ottawa.

INVOICING OF CANADIAN SHIPMENTS ABROAD: A SUGGESTION TO EXPORTERS

It is in the interests of Canadian exporters that the official trade reports of other countries should credit to Canada all imports originating in this country. Where Canadian exports are consigned to their final destination through agents in the United States or other countries they are sometimes invoiced as from the latter rather than from Canada. As a result the entry in the importing country contains no reference to the Canadian origin of the goods.

It is considered desirable therefore that Canadian exporters should instruct their agents in such cases to invoice their goods specifically as made in Canada.

TRADE AND CONDITIONS IN THE UNITED KINGDOM DURING 1922

Trade Commissioner Harrison Watson

London, January 18, 1923.—Nineteen hundred and twenty-two was again a difficult and disappointing year, for although some slight improvement was experienced in certain directions, there was no general realization of the eagerly anticipated trade revival.

The progress of British trade and industry during the past year has been aptly described as "dragging along the bottom," because the only variation which has disturbed its otherwise monotonous movement has been the occasional bump which is always associated with this somewhat uncomfortable form of locomotion.

Once again any favourable sign of recovery had only to show itself to be promptly throttled by the outbreak of some fresh complication, international or domestic, and while conditions in the United Kingdom are certainly better and home trade is exhibiting more activity in certain branches, the financial and general position in several European countries became distinctly worse during the last year, and at its close the situation on the Continent is probably more serious than at any time since the end of the war.

Considered from this point of view, the returns of the overseas trade of the United Kingdom for 1922 can be regarded as containing elements of encouragement. They are as follows, and for purposes of comparison they are contrasted with the figures for 1921:—

	1922 £	1921 £	Increase or Decrease £	Per cent
Imports..	1,003,918,124	1,085,500,061	(–) 81,581,937	(–) 7.5
Exports (British)..	720,496,426	703,399,542	(+) 17,096,884	(+) 2.4
Re-exports	103,777,871	106,919,306	(–) 3,141,435	(–) 2.9
Total..	1,828,192,421	1,895,818,909	(–) 67,626,488	(–) 3.5

The figures are, moreover, better than they appear, because the average of wholesale prices was considerably lower in 1922 than in 1921. According to the index maintained by the Department of the Board of Trade, whereas the monthly average of wholesale prices in 1921 showed an increase of 97·2 per cent over 1913, the monthly average for the past year fell to 58·5 per cent, which indicates a reduction in valuation of nearly 20 per cent, and a certainty that there was some increase in the quantities involved.

SOME FEATURES OF THE YEAR

Probably the most favourable feature of the twelve months is the restoration of England's financial credit, as illustrated by the remarkable advance in the dollar value of the pound sterling to a figure which approaches parity. Upon the other hand, this has been accomplished at the cost of great sacrifices, for at the moment the staggering burden of taxation which British industry and trade is shouldering is one of the main deterrents to the return of prosperity. It is true that during the year some partial relief was afforded by the reduction of one shilling in the income tax, which, however, still stands at the formidable figure of five shillings in the £1. In addition to the handicap which it places upon export trade, this heavy taxation seriously depresses home trade by curtailing the spending power of the people, and is also directly responsible for a great deal of the unemployment which still prevails.

Another satisfactory feature is the comparative stability in the level of wholesale prices which seems to have been reached. According to the well-known authority "The Economist," whereas on December 31, 1921, the level stood at 169·6 in comparison with 100 in July, 1914, the figure on December 31, 1922, had only fallen to 166·2, an almost fractional difference, and a marked halt in the headlong tumble which had been previously taking place, while during the whole year such variations as occurred were slight and often seasonal. In view of the important bearing of values on the volume of trade, it is interesting to reproduce the full table showing price movements from 1914 to the present time:—

End of:	Cereals and Meat	Other Food	Textiles	Minerals	Miscel-laneous	Total
July, 1914..	100	100	100	100	100	100.0
Dec. 1918..	226	222	293	186	241	237.5
Dec. 1919..	249	250	396	247	263	287.1
Mar., 1920..	261	260	484	269	309	325.6
June, 1920..	261	263	415	278	281	305.9
Dec., 1920..	233	229	209	261	230	230.9
June, 1921..	203	188	158	210	185	187.5
Dec. 1921..	159	180	180	164	168	169.6
Mar., 1922..	169	195	168	151	161	167.5
June, 1922..	174	192	184	149	160	171.1
July, 1922..	172	190	181	153	163	171.4
Aug., 1922..	153	192	183	149	160	165.9
Sept., 1922..	151	194	181	150	148	163.5
Oct., 1922..	153	199	187	154	147	166.1
Nov., 1922..	150	200	195	152	148	167.0
Dec., 1922..	149	200	193	152	156	166.2

At the same time the present prices of many commodities remain far too high, and it is generally thought that substantial, if gradual, reductions must precede any really active revival in trade.

There have been considerable reductions in wages in many industries during the twelve months, and labour in many ways has shown a more reasonable attitude, but as a well-known authority points out, this fall has not been general, and at the moment extraordinary and unjustifiable irregularities exist in the rates of remuneration in different branches of work, which not only cause wide discontent among workers but seriously hamper many of the other industries of the country which have to use these products of overpaid industry.

In any case it is certain that high wages, short hours, and heavy taxation render it difficult, and often impossible, for British manufacturers to compete in most overseas market, and that their difficulties are greatly increased by high prices of materials and the unnecessarily high cost of railway and other transportation which still prevail. Another, and still more ominous obstacle, is the tendency of many nations largely to increase their import duties. Several notable cases occurred during the past year, and these hostile tariffs place the United Kingdom at a particular disadvantage, because owing to its fiscal policy the country is practically without means of retaliatory negotiation.

Consequently, with every desire to be optimistic—and there are some grounds for a better feeling—the knowledge of the extent to which the prosperity of Great Britain depends upon its export trade, and the certainty that no real trade revival can take place until export trade is restored to its pre-war level. renders it impossible to regard the immediate future with any particular confidence, or. to anticipate anything but slow and halting recovery until British manufacturers and merchants can recover the many valuable markets which are temporarily closed to them.

As has been previously mentioned, the past year has witnessed some improvement in certain branches of industry. Resulting from the coal strike in the United States and the course of events on the continent, there was a welcome and important increase in the export of coal which has partly compensated that industry for the loss of demand caused by the continued closing down of many home factories. The same reasons are mainly responsible for the revival in activity in the iron and steel trades, the latter part of the year witnessing a considerable increase in production of many varieties, and the blowing-in of a number of blast furnaces. The autumn also shows some improvement in shipbuilding. Experience has, however, varied greatly. The cotton and several other important industries have passed through disastrous times and certain trades have been stagnant and depressed.

The disposal of the remainder of most Government accumulations of stocks has cleared the air, but extensive writing-down and general readjustment has again obliged a number of important enterprises to pass their dividends and some to announce heavy losses.

Unfortunately, while the year has seen some slight reduction in unemployment, at the end of December 1,541,535 were officially recorded as being out of work; and other indications of the difficulties which are still being encountered were an increase in the number of bankruptcies, which in England and Wales alone rose to 4,806 as against 3,495 in 1921 and 1,594 in 1920, while there was a general decrease in the earnings of banks. As an illustration, the net profits of the five great London chartered banks, which were £14,715,349 in 1920 and £11,407,392 in 1921, further diminished to £9,938,309 in 1922.

RE-ORGANIZATION OF RAILWAY SYSTEM

A noteworthy event of the year has been the reorganization of the railways of Great Britain. The old lines are now grouped together into geographical divisional systems, designated resepectively: the Great Western, the London Midland and Scottish, the London and Northeastern, and the Southern.

This is the realization of the project first introduced by Sir Eric Geddes when Minister of Transport, and its avowed object is economy and greater efficiency. The new arrangement came into force on the 1st January, 1923, and it is to be anticipated that with the adoption of supervision somewhat upon the lines of our own Board of Railway Commissioners, important and greatly needed improvements may be made. In the meantime, however, in spite of much lauded reductions, both passenger and freight rates remain still 50 per cent above the pre-war level.

THE COURSE OF OVERSEAS TRADE

The most noticeable feature in the returns of overseas trade month by month is the even course which trade in all its branches pursued during 1922, with scarcely any deviation. The happy combination of a reduction of value in imports with an increase, however slight, in the value of exports, has caused a substantial reduction in the excess of imports over exports, and the amount £180,156,925 is not only a reduction of £97,616,611 from 1921, but by far the lowest adverse balance which has been experienced since the war. The figures are as under:

1922	Imports	Total Exports	Excess of Imports over Exports
January	£76,488,231	£71,605,815	£ 4,882,416
February	69,374,882	68,509,270	865,612
March	87,879,424	74,734,405	13,145,019
April	80,661,216	64,707,423	15,953,793
May	88,814,459	67,010,252	21,804,207
June	84,298,169	60,866,160	23,432,009
July	81,783,534	68,735,264	13,048,270
August	82,661,405	67,536,162	15,125,243
September	76,943,609	68,892,542	8,051,067
October	85,014,529	68,675,994	16,338,535
November	95,600,143	75,638,912	19,961,231
December	94,911,621	67,362,098	27,549,523
	£1,004,431,222	£824,274,297	£180,156,925

TRADE ACCORDING TO CLASSIFICATION

Although it has been thought unnecessary to reproduce in their entirety the summaries of foreign trade which are published according to the classification adopted by the Board of Trade, the following résume of the grouping of imports and exports seems useful:—

TABLE OF IMPORTS, EXPORTS AND RE-EXPORTS ACCORDING TO THE BOARD OF TRADE CLASSIFICATION, DURING THE CALENDAR YEARS 1920, 1921, AND 1922

(a) Imports, Value c.i.f.

	1920	1921	1922
Food, Drink and Tobacco	£ 765,807,875	£ 567,005,947	£ 472,628,291
Raw Materials and Articles Mainly Unmanufactured	710,355,635	270,794,031	298,240,898
Articles Wholly or Mainly Manufactured	453,439,840	244,480,368	229,919,396
Animals, not for Food	401,739	394,213	362,236
Parcel Post, Non-dutiable Articles	2,643,792	2,825,502	2,767,303
Total	£1,932,648,881	£1,085,500,061	£1,003,918,124

(b) Exports of Produce and Manufactures of the United Kingdom, Value f.o.b.

	1920	1921	1922
Food, Drink and Tobacco	£ 50,936,451	£ 37,399,209	£ 36,319,841
Raw Materials and Articles Mainly Unmanufactured	145,515,803	63,594,875	102,015,196
Articles Wholly or Mainly Manufactured	1,119,739,723	588,889,124	569,420,103
Animals, not for Food	4,805,512	3,427,072	1,476,726
Parcel Post	13,471,780	10,089,262	11,264,560
Total	£1,334,469,269	£ 703,399,542	£ 720,496,426

(c) Exports of Foreign and Colonial Merchandise, Value f.o.b.

Food, Drink and Tobacco	£ 46,094,493	£ 30,221,309	£ 21,776,979
Raw Materials and Articles Mainly Unmanufactured	122,930,875	50,037,281	55,116,156
Articles Wholly or Mainly Manufactured	53,649,270	26,541,531	26,831,850
Animals, not for Food	78,693	119,185	52,886
Total	£ 222,753,331	£ 106,919,306	£ 103,777,871

IMPORTS AND EXPORTS

Space does not permit any comprehensive analysis of the import and export trade during the twelve months, so it will therefore suffice to say that the decreased valuation of *Imports*, £81,581,937, compared with 1921, while partly due to lower prices, is more than represented by the falling off in "Food, Drink and Tobacco," in which, moreover, the heaviest drop in values took place.

There is, however, an encouraging increase in the value of the receipts of "Raw Materials" amounting to about 10 per cent, which is really much greater when it is remembered that in 1921 coal to the value of over £12,000,000 was imported as a result of the coal strike, and that the item has disappeared from this year's list. At the same time there is a small shrinkage in arrivals of wholly manufactured goods.

Turning to *Exports*, while the expansion of £17,000,000 in the value of exports of British products is naturally a subject for congratulation, an examination of the statistics discloses the fact that this increase is entirely due to a revival in the overseas coal trade, because exports of coal in themselves marked an increase of £30,000,000 over 1921, the quantities aggregating respectively 64,000,000 tons against 24,000,000 tons. Upon the other hand, it is regrettable to find that the value of British manufactured goods exported has shown a reduction of £19,000,000, although this is chiefly attributable to a heavy drop in shipments of machinery.

During the year, moreover, the entrepot trade made little headway, the aggregate value of shipments showing a loss of £3,000,000 in comparison with 1921.

Some Notes on Imports from Canada

The trade statistics for the whole year are accompanied by the usual unrevised figures showing the imports and the countries of consignment of a number of important articles of food and raw materials, the details of those of special interest to Canada being reproduced in the table which follows.

A study of these will show that, thanks chiefly to the abundant grain harvest, Canada made up considerable of the leeway which had occurred during the earlier part of the year. As regards unrecorded commodities, and manufactured goods, it must be again explained that the itemized returns showing countries of origin will not be published for many months yet. Indeed, at the moment, the figures relating to the calendar year 1921, have not so far been publicly issued.

It is certain, however, that the spasmodic imports of the large variety of Canadian manufactures of all kinds which characterized the war period and the time immediately succeeding the armistice, have gradually disappeared, and that imports for consumption in the United Kingdom are becoming increasingly centred on manufactures for the production of which Canada possesses special natural advantages. Illustrations of this tendency are indeed to be found in the paper imports shown in the table. It is worth noting in this connection that during the past year one of the largest Canadian enterprises manufacturing writing paper has established an office in London.

As regards, however, the items for which figures are already available, the receipts of Canadian *wheat* almost doubled, and the share would undoubtedly

be substantially increased were it not that so much of the Canadian wheat which reaches the United Kingdom through United States ports is credited in the United Kingdom returns as being the product of the United States, more especially when shipped and financed by American firms.

The increased arrivals of wheat generally are, it should be pointed out, countered to some extent by a falling-off of over 2,000,000 cwts. in receipts of imported *flour*. This loss, however, falls mainly on the United States, because the quantity received from Canada showed an increase of 750,000 cwts, in comparison with 1921.

Consignments of *cattle*—which it seems desirable to point out had to be slaughtered at port of entry—fell away, the decrease in the case of Canada being larger than in that of the United States. The removal of the long-standing embargo against the importation of Canadian cattle for fattening purposes which, from a Canadian point of view, formed one of the chief political events of the past year, restores a trade which attained regular and considerable dimensions before the restriction came into force. The progress of events is awaited with considerable curiosity, for although it is confidently anticipated that large quantities of Canadian stores should reach these shores by the autumn, when arrangements can have been completed, the numbers which this trade will attain are entirely a matter of surmise at present.

Canada's contribution of *butter* went up from 43,138 cwts. in 1921 to 151,532 cwts., but even thus almost quadrupled, represents less than 3 per cent of the total quantity imported.

Receipts of Canadian *cheese* fell still further away, and Canada, which formerly practically monopolized the trade of the United Kingdom in imported cheese, now provides little more than one-third of the total receipts, and last year only a trifle over three-quarters of the quantity of cheese shipped by our former pupil, New Zealand. A noteworthy item of the close of the year was the strong advance which took place in both Canadian and New Zealand cheese owing to diminished consignments and the knowledge that only short supplies were available. In this connection, it is also worth recording that the improvement in the quality of New Zealand cheese has caused the practical disappearance of the margin in price which formerly separated it from Canadian.

The case of *canned salmon* supplies a still stronger case of changed sources of supply. In 1922 Canadian consignments sank to 54,145 cwts, or less than one-third of the 1921 trade, and although arrivals from the United States were practically unaltered, the combined receipts from these two countries totalled only 284,961 cwts. against the 341,390 cwts, which came in under the description " other countries ", which means Siberian salmon through Japanese channels.

Another notable feature of the year is the jump in *newsprint* from Canada, with which item is combined writing paper, from the insignificant total of 5,203 cwts. in 1921 to 189,681 cwts, which is accompanied by a similar remarkable expansion under the heading "*wrapping paper*", although even now Canada's share of the total import trade of each commodity remains comparatively small.

Nineteen hundred and twenty-two witnessed a welcome recommencement of activity in the *timber* trade, in which, it will be observed, Canada shared.

IMPORTS OF CERTAIN AGRICULTURAL PRODUCTS, ETC., INTO THE UNITED KINGDOM DURING THE CALENDAR YEARS 1921 AND 1922

	1921		1922	
	Quantity Cwts.	Value £	Quantity Cwts.	Value £
1. *Wheat—*				
Total imports	80,478,794	70,606,068	96,374,134	58,789,358
United States	36,065,002	31,523,056	37,261,500	22,489,539
Australia	20,108,715	17,783,123	16,334,997	10,265,584
Argentine	4,186,460	3,642,458	18,804,200	11,626,921
British East Indies	2,660,200	2,766,874	487,600	297,259
Canada	14,589,320	12,216,573	22,909,800	13,789,734
2. *Wheat Meal and Flour—*				
Total imports	15,841,055	19,064,025	13,481,021	10,674,038
United States	7,900,742	9,408,921	4,576,701	3,662,967
Australia	1,380,700	1,627,426	1,778,130	1,383,122
Argentine	114,737	96,491	290,300	146,192
Canada	5,866,019	7,126,745	6,596,440	5,311,709
3. *Barley—*				
Total imports	15,812,652	10,529,381	12,693,275	6,068,616
United States	8,587,000	6,153,976	5,921,300	2,846,954
Roumania	982,500	560,994	1,544,000	667,339
Canada	3,119,200	1,870,078	2,545,400	1,112,180
4. *Oats—*				
Total imports	8,356,836	4,402,820	9,356,902	4,363,001
Argentine	3,231,540	1,614,300	2,164,720	985,238
United States	434,800	250,838	2,957,500	1,334,509
Roumania	218,800	107,683	151,800	66,799
Canada	3,591,800	1,901,545	3,328,920	1,610,734
5. *Peas, not fresh—*				
Total imports	1,313,004	1,646,513	1,314,508	1,699,038
Japan	296,660	420,280	231,383	418,450
British East Indies	910	1,718	57,650	33,570
Canada	10,948	30,948	17,193	28,040
6. *Bacon—*				
Total imports	5,677,588	43,528,206	5,932,152	35,530,534
United States	2,509,379	16,266,867	2,463,368	12,182,415
Denmark	1,849,885	16,930,004	2,363,736	16,660,616
Canada	844,024	6,217,080	737,273	4,321,984
7. *Hams—*				
Total imports	1,127,287	8,216,943	1,433,242	8,585,366
United States	1,020,718	7,472,465	1,320,559	7,907,710
Canada	93,906	656,483	96,370	592,018
8. *Cattle, for food—*	Number		Number	
Total imports	66,674	2,756,193	49,557	1,580,155
United States	34,880	1,519,685	29,595	1,012,358
Canada	31,794	1,236,508	19,960	567,737
9. *Butter—*	Cwts.		Cwts.	
Total imports	3,523,976	42,339,947	4,268,561	37,315,536
Denmark	1,250,176	15,084,605	1,423,796	13,969,683
Australia	928,006	11,105,524	901,507	6,747,868
New Zealand	709,381	8,494,063	1,103,444	9,340,703
Argentine	401,354	5,017,034	356,158	2,731,441
Netherlands	63,065	744,245	78,615	710,399
United States	1,888	11,160	34,354	346,624
Canada	43,138	529,856	154,532	1,530,768
10. *Cheese—*				
Total imports	2,817,465	17,446,521	2,659,464	12,437,810
New Zealand	1,302,766	8,728,777	1,294,779	5,883,957
Netherlands	128,032	768,956	175,761	740,956
Australia	83,622	501,912	99,720	434,118
United States	49,063	307,789	21,998	99,237
Canada	1,195,661	6,666,844	949,162	4,493,503
11. *Eggs, in shell—*	Gt. Hundreds		Gt. Hundreds	
Total imports	10,557,504	11,395,828	13,661,671	11,301,652
Denmark	4,735,275	5,455,373	5,734,577	5,644,967
Egypt	642,000	508,256	1,259,590	752,867
China	468,233	462,392	1,057,086	639,026
Netherlands	505,493	573,804	650,200	571,277
Canada	684,480	788,069	495,729	448,576

IMPORTS OF CERTAIN AGRICULTURAL PRODUCTS, ETC.—*Concluded*

	1921		1922	
	Quantity Cwts.	Value £	Quantity Cwts.	Value £
12. *Canned Salmon—*				
Total imports	576,569	4,314,620	626,351	3,875,727
United States	227,213	1,602,651	230,816	1,063,508
Canada	169,736	1,263,246	54,145	303,021
Other Countries	179,620	1,448,723	341,390	2,509,198
13. *Canned Lobsters—*				
Total imports	36,223	532,415	37,357	682,152
Newfoundland and Coast of Labrador	3,849	45,921	2,408	43,442
Canada	31,918	479,780	33,389	609,734
14. *Flax Seed or Linseed—*	Tons		Tons	
Total imports	469,793	8,592,808	358,884	7,012,512
Argentine	401,978	7,174,036	178,995	3,379,112
British East Indies	41,941	910,041	158,231	3,184,319
Russia	1,172	23,169	422	9,152
Canada	602	18,108	327	10,405
15. *Paper, Printing, not Coated, and Writing Paper in Large Sheets—*	Cwts.		Cwts.	
Total imports	2,755,468	4,752,271	3,832,358	4,401,492
Newfoundland and Coast of Labrador	745,720	1,193,490	1,108,757	1,402,752
Norway	219,557	415,537	649,291	683,054
Sweden	572,761	1,002,754	573,219	647,179
Canada	5,203	15,671	189,681	197,105
16. *Paper, Packing and Wrapping, including Tissue Paper—*				
Total imports	1,532,864	3,051,600	2,818,436	3,815,597
Sweden	632,183	1,172,240	1,058,478	1,367,257
Norway	261,729	506,428	641,514	815,152
Germany	166,267	320,714	381,901	474,969
Finland	204,560	350,854	282,740	348,016
Belgium	77,291	246,067	90,202	225,706
Canada	17,584	35,183	116,876	148,110
17. *Horses, including Ponies—*	Number		Number	
Total imports	2,927	226,430	1,718	191,480
United States	312	44,510	185	21,224
Canada	115	2,905	4	550
18. *Wood and Timber, Hewn, Hard, Other than Mahogany—*	Cu. Ft.		Cu. Ft.	
Total imports	1,781,409	788,050	2,146,301	703,499
British East Indies	485,348	282,261	443,569	248,168
United States	260,637	140,414	158,808	42,663
Canada	324,430	109,232	280,245	73,523
19. *Wood and Timber, Hewn, Soft—*	Loads		Loads	
Total imports	130,919	1,019,153	152,061	823,867
United States	49,455	459,523	67,289	464,740
Norway	25,255	239,199	16,699	85,731
Sweden	15,209	111,937	24,765	85,074
Canada	2,503	48,256	3,919	49,213
20. *Wood and Timber, Sawn, Hard, Other than Mahogany—*	Cu. Ft.		Cu. Ft.	
Total imports	8,383,537	3,679,784	13,108,846	3,731,242
United States	4,409,514	1,824,491	8,124,308	2,301,830
British East Indies	634,367	485,908	606,148	330,059
Canada	944,939	270,790	2,326,862	401,816
21. *Wood and Timber, Sawn, Soft—*	Loads		Loads	
Total imports	2,057,588	13,557,309	3,998,728	20,955,710
Sweden	643,407	4,398,280	1,148,268	5,659,118
Finland	717,049	3,281,210	1,026,664	4,688,570
Russia	114,815	755,785	392,044	2,341,769
United States	83,750	1,029,010	176,515	1,521,280
Canada	190,229	1,848,965	466,902	2,756,744
22. *Wood Pulp, Mechanical, Wet—*	Tons		Tons	
Total imports	367,957	4,277,901	554,638	2,825,685
Norway	191,876	1,969,607	268,718	1,346,455
Canada	133,416	1,865,175	144,656	804,370

BUSINESS PROSPECTS IN THE LIVERPOOL DISTRICT

Trade Commissioner J. Forsyth Smith

Liverpool, January 16, 1923.—The following brief extracts from and summaries of articles by prominent representatives of Liverpool industry, which appeared in a New Year Commercial Supplement to the Liverpool *Daily Post*, will be of interest to Canadian exporters:—

THE PROVISION TRADE

Mr. James B. Hyslop, Chairman of the Liverpool Provision Trade Association, comments on the fluctuating values of provisions in the past few years, quoting prices of American hams as 100s. per cwt. in December, 1922, as against 140s. in June, 1922, 115s. in December, 1921, and 150s. in June, 1921, and American Cumberland as 95s. per cwt, in December, 1922, 100s. in June, 1922, 88s. in December, 1921, and 115s. in June, 1921. The prospects for the coming year, as he sees them, are promising both as regards prices (from the importer's point of view), and volume of supplies. "With indications of a slow but steady trade recovery, and a consequent decrease in unemployment, together with more hopeful conditions abroad, a better tone is becoming apparent in the trade. While fluctuations are still probable, these will approximate more closely to the normal fluctuations of seasonal markets, and with the now rapid return towards pre-war output of the Scandinavian export trade in bacon and butter, the war-time values, due largely to the dependence of Great Britain on the United States for the bulk of its hog products, will tend gradually to decrease. Freights are also declining and high war-time landing charges and dues being reduced. The return to prices approaching pre-war levels will not be rapid. The probabilities are for both plentiful and cheaper bacon and other hog products in the coming year."

MERSEY LIVE STOCK TRADE

"Although a larger number of cattle, sheep, and pigs were landed at the Birkenhead and Wallasey cattle stages during the past year than in 1921, salesmen at Woodside Lairages report a disappointing year. Unemployment and a general scarcity of money have militated against keen competition and the supply has nearly always been in excess of the demand. Prices, however, have kept fairly steady, the violent fluctuations which existed in many of the years since the war being almost absent."

In the early part of the year it was anticipated that large supplies of cattle would be imported from Canada and the United States, and to meet this expectation, additional accommodation was provided by the Dock Board. A shed on the south side of the Morpeth Branch Dock was fitted up to accomodate about 1,000 head of cattle and was included in the Woodside Lairage. The number arriving, however, was smaller than during the last nine months of 1921. The falling off is accounted for by the cost of freight across the Atlantic and the firm hold which the Irish trade has in the English market. Last year's foreign arrivals totalled 38,649 cattle, as compared with 49,434 cattle and 6,706 sheep in 1921.

The figures of the Irish trade are very illuminating. Since July 12, 1912, when the first animals from Ireland were landed in the Mersey, no fewer than 7,455,146 cattle, sheep and pigs have been dealt with at the Birkenhead and Wallasey Lairages. During the same period 94,091 cattle and 6,707 sheep have come from abroad.

The following table, showing the total arrivals at the Woodside and Wallasey cattle stages, indicates the proportions of the trade at the lairages:—

	Cattle	Sheep	Pigs
1919	253,767	262,137	29,052
1920	253,245	341,350	31,050
1921	245,232	332,893	19,224
1922	291,764	413,607	26,739

THE TIMBER TRADE

Mr. John Lyon, a member of the firm of John Lyon & Co., timber brokers, Liverpool, writes that 1921 followed one of the darkest years in the timber trade of Liverpool, and that conditions during 1922, with the shipbuilding, house-building, and furniture industries doing very little and the railways doing a minimum of construction work, were not much better. He forecasts more satisfactory conditions for 1923, as trade is slowly making progress, the railway timber stocks need replenishing on a large scale to make up for the inaction of the past six or seven years, and extensive building schemes are contemplated in the Liverpool district. The year 1922 began with heavy stocks of all classes of timber, but 1923 begins with depleted stocks due to light imports and fairly satisfactory consumption during the last half of the year. Stocks of spruce deals are on the low side, and prices are firmly held. Quebec pine deals are in good demand. The stock of pitch pine both in logs and planks is still heavy, but are steadily being reduced, and prices have improved. The demand for flooring boards has been of a satisfactory character.

In an authoritative review of the Baltic timber trade, in the *Yorkshire Post*, another writer expresses optimistic views:—"Generally, the outlook is much brighter than a year ago. With greatly reduced costs, speculative house-building has received an impetus that will last for years. The placing of several new orders for shipping tonnage will favourably influence the timber market, and expansion in engineering and railway requirements is also anticipated in the spring."

THE WHEAT TRADE IN 1922

Mr. G. J. S. Broomhall of the *Liverpool Corn Trade News*, writes that, in any review of the past year, prominence must be given to the abundant supplies harvested in the principal exporting countries, though the European harvest was unusually poor. The 20,000,000 quarters per annum that Russia formerly exported are now being largely furnished by the British Empire, chiefly by Canada. Previous to 1914, the annual exports of Canada were 12,000,000 quarters, but since that date they have averaged 21,000,000 quarters, and in the season about to commence they may total as much as 37,000,000 quarters. "It is satisfactory to note that the proportion of the world's supply furnished by the British Empire is steadily increasing, and that the quality also is fine. There is no better wheat in the world than that grown on the Canadian prairies, and the Australian product is also good, of splendid colour, although lacking the great strength of the Canadian."

"The level of prices of the beginning of 1922 was relatively moderate, No. 1 Northern Manitoba being quoted at 51s., but by the end of February, owing to free buying by Russia, Japan and India, prices increased to 65s. A sharp reaction took place in March, as crop prospects improved in America, and a steady downward movement during the summer, till in September, Manitoba wheat could be bought at 49 shillings. In October there was a fair advance, influenced by fears of war with Turkey, by the railway and coal strikes in America preventing large shipments, and by the shortage of the European crop. On November 1, prices were 51s. 6d., but during that month Canada shipped in large quantities, and Canadian prices declined. Early December witnessed

record-breaking shipments, but the year closed with prices holding up fairly well owing to the firmness of Chicago, and some delay to the Argentine harvest by rains. If the Argentine crop, a good one, is saved in good condition, it seems likely that the efforts of Americans to force up prices will not have much success. At the present time, Canada is still offering plenty of wheat, and this fact helps to make Liverpool buyers unwilling to follow advances reported from the United States."

Dealing with flour, Mr. Broomhall says that trade in 1922 has been very slow, due to the fact that "the world is over-milled, and that therefore the full potential output cannot be marketed." As a remedy for overproduction, British millers are considering a scheme to organize the trade so as to produce only what is required for their customers, but, as imports could not be controlled, it is not believed this would produce the desired results. At times during the year, the competition of Canada and Australia was extraordinarily keen, Canadian flour being offered at 51s. per 280 lbs. and Australian at 44s. as against 54s. for the home-milled product. The actual quantity of Australian imported was not large, about 700,000 sacks, while the quantity from North America was over 4,000,000 sacks. Prospects are considered bright for home millers, owing to the reasonable cost of Canadian wheat, and the quantities of Indian wheat being offered. The following table is given of the monthly prices of bakers' grade flour (per sack of 280 lbs.) in Liverpool during recent years:—

	1922	1921	1914	1913
January	40s. 6d.	80s.-76s.	25s. 0d.	26s. 9d.
February	39s. 6d.	76s.-68s.	25s. 3d.	27s. 2d.
March	51s. 6d.	68s. 0d.	25s. 6d.	26s. 6d.
April	45s. 6d.	68s. 0d.	25s. 3d.	27s. 1d.
May	46s. 6d.	67s. 8d.	25s. 6d.	27s. 8d.
June	44s. 6d.	68s. 5d.	25s. 6d.	27s. 0d.
July	43s. 0d.	66d. 8d.	25s. 0d.	27s. 0d.
August	42s. 0d.	61s. 3d.	33s. 0d.	26s. 11d.
September	39s. 0d.	57s. 9d.	33s. 6d.	26s. 6d.
October	37s. 6d.	54s. 3d.	32s. 6d.	26s. 0d.
November	41s. 0d.	48s. 7d.	34s. 6d.	25s. 9d.
December	40s. 0d.	43s. 6d.	35s. 9d.	25s. 9d.

The president of the Liverpool and District Millers' Association, after commenting on the fact that Liverpool is the second greatest milling centre in the world, being inferior in this respect to Minneapolis only, states that the milling capacity of the area is 1,172 sacks of flour per hour, or 11,300 sacks per annum, sufficient to feed a population of 14,124,000. Imports of foreign flour on the home market amount to 15 per cent of the total consumption, as compared to 11 per cent in the year before the war.

A BANKER'S POINT OF VIEW

Sir James Hope Simpson, a prominent banker writes: "From a banker's point of view, the prospects for 1923 are encouraging. There are indications that trade is improving, and while there are still difficulties ahead, particularly in the market for cotton goods, there is a real possibility that the year 1923 may prove to be the first of a series of years of trade recovery and prosperity.

THE LANCASHIRE COTTON INDUSTRY

A larger trade has been done by the cotton spinners and manufacturers of Lancashire than in 1921, there being a decided increase in the exports abroad, but the industry as a whole has experienced twelve months of depression, the contracts booked not being sufficient to keep all the machinery at work. In January last, half the looms in Lancashire were standing idle for want of work. More machinery was started as a result of improved demand during the summer,

and at the end of July about 90 per cent of the looms were working. Since then ground has been lost, and, during the last two months, there has been a tendency for more machinery to stand idle.

The prospects for 1923 are dependent to a considerable extent on political developments. The industry is first and foremost an export trade, and the producers cannot do well unless there is peace and prosperity abroad. It is reasonable to anticipate that trade in the coming year will be healthier than during 1922. Extensive buying may not take place, but it is likely that the urgent needs of the consumers will be sufficient to provide more work than at present for employers and operatives.

THE IRON AND STEEL INDUSTRY

Sir William Larke, Director, National Federation of Iron and Steel Manufacturers, states that in 1921 the iron and steel industry had reached the lowest level in its history, having regard to its output capacity, and that, though 1922 has shown continuous improvement, by the end of the year the rate of production of pig iron was still only 60 per cent of the average monthly rate in 1913. In steel production, progress was more marked, and by the end of November, the rate of output had reached 90 per cent of the monthly rate of 1913, though it must be remembered, on the other hand, that the steel producing capacity of the country was increased by 50 per cent during the war period. The two adverse factors have been the slump in shipbuilding, which cut down the production of ship plates from 1,654,700 in 1920 to 600,000 tons in 1922, and the failure of the railway companies to place substantial orders for replacement and maintenance material. Total exports monthly have ranged from 223,616 tons in February to 372,332 tons in November, as compared with a monthly average for 1913 of 414,100, 270,900 in 1920, and 141,700 in 1921.

It is regarded as rash to prophesy any great revival of trade for 1923, but it is encouraging to note that the curves of demand and production have been moving steadily upward for the past six months without a break. The recent increase in the shipping tonnage placed on the Tyne, the Tees and the Clyde, together with the two capital ships, and the undertaking given by the railways to place orders for maintenance and repairs to the fullest possible extent in the near future, should give an impetus to the industry, and it is hoped that a considerable improvement will be experienced. With an increased production capacity, however, of 50 per cent above pre-war, and a ratio of exports to total production pre-war of 50 per cent, the export trade in iron and steel must be increased 100 per cent if the present production capacity is to be fully and economically employed.

GROWING USE OF PAPER CONTAINERS

In the near future, says the London *Times Trade Supplement,* the housewife will refuse to buy any domestic commodity which is not wrapped and sealed in a sanitary paper container. This may appear to be a bold statement, but the public is gradually becoming aware of the fact that one of the best guarantees of the purity of foodstuffs is the sealed and proofed paper package of a reliable house. The obvious result of this tendency is that the trade demand for efficient and attractive forms of paper boxes and bags will increase.

Four varieties in particular of this ubiquitous form of paper packing will find very extensive development during the next ten years. They are the fibreboard packing-case for the transit of merchandise by rail or sea; the carton, or folding box, for the packing of all manner of solid foodstuffs; the composite container, or round box, for holding powdered and semi-liquid articles; and the waxed paper wrapper, or bag, for bread, cake, and similar edibles. Such development must improve the nation's trade in general, just as the remarkable achievements in the production of artistic chocolate boxes has been an enormous factor in the development of that industry.

TIMBER TRADE OF STATE OF VICTORIA

Trade Commissioner D. H. Ross

Melbourne, December 27, 1922.—Covering a long period of years, a comparative annual statement of the importation and consumption of timber in the state of Victoria has been compiled by an expert enjoying the complete confidence of the trade. The figures have invariably been accepted as being both authoritative and reliable. In no other Australian state is such a compilation made, but—with some allowances for variation of no material importance—the Victorian returns may, with confidence, be regarded by Canadian exporters as a reflex, generally, of the Australian trade in imported timber.

The importations into Victoria of all classes of timber for the pre-war normal fiscal year ended on June 30, 1914, were 160,609,000 superficial feet as compared with 92,239,000 in 1921 and 66,475,000 in 1922. The total stocks held in Melbourne on June 30, 1914, aggregated 76,913,000 superficial feet, in comparison with 50,587,000 in 1921 and 33,457,000 in 1922. The total consumption in Victoria in 1914 was 151,854,000 superficial feet as compared with 67,353,000 in 1921 and 83,605,000 in 1922.

The appended schedules demonstrate the dependence of Australia upon outside sources for the soft woods necessary for building and other purposes. While Victoria has produced, from her own forests, about 90,000,000 superficial feet of hardwood in each of the last two years, it is claimed that the larger the demand for native timber, the more soft woods are required.

TIMBER STOCKS HELD IN MELBOURNE ON JUNE 30, 1921 AND 1922

The following return indicates the total quantities of each variety of timber held in Melbourne on June 30, 1921, and June 30, 1922:—

	1921 Superficial Feet	1922 Superficial Feet
Red deals	366,000	269,000
Baltic floorings, etc., dressed	18,173,000	7,248,000
Spruce and hemlock	26,000	732,000
Douglas fir ("Oregon")	8,887,000	6,737,000
Yellow pine and doorstock	977,000	593,000
Redwood	11,230,000	3,245,000
Dressed American shelving	......	30,000
New Zealand Kauri pine	1,612,000	2,716,000
New Zealand white pine, etc.	9,291,000	11,871,000
Clear pine	25,000	16,000
Total	50,587,000	33,457,000

It will be observed that on June 30, 1922, the stocks held in Melbourne were 17,130,000 superficial feet less than at the end of the previous year.

IMPORTATIONS OF TIMBER INTO MELBOURNE IN 1921 AND 1922

In the comparison of the total importations of all kinds of timber into the state of Victoria in 1921 and 1922 the most striking decrease is in dressed Baltic floorings, linings and weather-boards by no less than 18,914,000 superficial feet. With a substantial decrease in both the importations for the fiscal year ended on June 30, 1922, and in the stocks held in Melbourne on that date, the outlook for a marked revival in the trade depends materially upon a reduction in building costs.

The following schedule of the importations of timber into Melbourne in 1921 and 1922 is submitted for general information:—

	1921 Superficial Feet	1922 Superficial Feet
Red deals	80,000	337,000
Baltic floorings, etc., dressed	34,753,000	15,839,000
Spruce and hemlock	......	3,672,000
Douglas fir ("Oregon")	20,187,000	23,950,000
Yellow pine and doorstock	1,256,000	236,000
Redwood	17,368,000	2,658,000
Dressed American shelving	......	55,000
New Zealand Kauri pine	1,465,000	1,895,000
New Zealand white pine, etc.	17,119,000	17,823,000
Clear pine	11,000	10,000
Total	92,239,000	66,475,000

The importations of all classes of timber into Melbourne in 1922 showed a contraction of 25,764,000 superficial feet as compared with 1921.

Some 13,513,000 laths and 213,000 pickets from North America were landed in 1922.

AUSTRALIA AT BRITISH EMPIRE EXHIBITION, 1924

C. Hartlett, Office of the Trade Commissioner

Melbourne, December 27, 1922.—Recent statements by the Australian Commission for the British Empire Exhibition to be held in London in April, 1924, indicate that good progress is being made with the preliminary arrangements for making an imposing and attractive display of the productive capacity of the Commonwealth.

It has been arranged that a committee in each state will obtain and prepare the exhibits, which are expected to be representative of the best that Australia can produce in its primary and secondary industries. These state committees will be called together early next year, and it is considered that most of their work will ultimately be concerned with the rejection of proffered exhibits, as a consistent standard of high quality will be set and strictly maintained. The Central Committee will be responsible for the erection of buildings, organization of the exhibit and control expenditure.

Special attention is to be devoted to canned fruits and meat, which industries are in a somewhat depressed condition owing to the severe competition in London markets upon which Australia so largely depends.

As previously reported, the sum of £200,000 has been granted by the Commonwealth and State Governments to cover expenditure over and above that to be incurred in procuring and preparing the exhibits for f.o.b. shipment.

HANDLING OF AUSTRALIAN ORANGES ON CONSIGNMENT

A communication has been received from the Canadian High Commissioner's Office, London, England, stating that a firm in that city are desirous of getting into touch with reliable firms at Vancouver, Montreal, Halifax, and other cities who would buy or handle Australian oranges on consignment. The name of this firm, which is on file at the Department of Trade and Commerce, Ottawa, may be obtained from the Director, Commercial Intelligence Service, Ottawa.

WOODEN CORKS OR STOPPERS WANTED IN AUSTRALIA

Some time ago a report was received from the office of the Canadian Trade Commissioner in Melbourne, for publication in the *Commercial Intelligence Journal,* which indicated a market for wooden corks or stoppers in Australia. Owing to the samples having gone astray, this report was not published at the time it was received. As the samples later came to hand, and the market promises to be a recurrent one, opportunity is now taken to publish this report, which reads as follows:—

The Assistant to the Canadian Trade Commissioner at Melbourne, Australia, has been requested to obtain prices on 1,000, 3,000 and 5,000 gross lots of a wooden cork or bottle stopper as near as possible in shape to samples received at the department, which are available for the inspection of interested manufacturers (refer to file No. T.C. 2-101). Samples and prices are to be submitted to the Commissioner at Melbourne as early as possible. The samples are to be absolutely plain, without any marks that may appear on those received for guidance. It is understood that any suitable wood may be used—that is, any wood that may be properly turned in manufacture, whether soft or otherwise, as the inquirers claim that they have a process of treatment which renders any wood impervious to moisture.

Quotations are desired alternatively f.o.b. steamer Canadian ocean port and c.i.f. Melbourne, packed in 20-gross boxes. The customs duty is 49½ per cent net.

It is suggested that, accompanying the samples and quotations, the cable code address of the manufacturer be also sent, together with ciphers to be used in indicating the quantities required, as it is intended to cable orders if samples and prices are satisfactory. Prompt payment is assured for all orders placed. Samples may be sent expeditiously and cheaply by registered packet post addressed to Canadian Government Trade Commissioner, Box 140, G.P.O., Melbourne, Australia.

LARGE CONTRACTION IN EXPORTS OF AUSTRALIAN FOOTWEAR

C. Hartlett, Office of the Trade Commissioner

Melbourne, December 27, 1922.—Recent figures made available by the Victorian Boot and Shoe Manufacturers' Association indicate that the exports of footwear from Australia, which reached large dimensions during war years, have practically fallen to pre-war levels.

In 1914-15 the value of the exports to all countries was £22,000. In 1917-18 they rose to £147,000, in 1918-19 to £350,000, and in 1919-20 to £837,000. In 1920-21 they fell to £682,000 and in 1921-22 to £113,000. For the first nine months of the present year—January to September—they amounted to only £44,250 with a constantly lessening demand. While trade has been lost with all countries from which previously there was a good demand, the loss of such markets as New Zealand and South Africa are the most keenly felt by the trade.

It is considered that Australia's failure to hold outside markets is principally attributable to the high rates of wages prevailing, and to increased duties on many articles essential to the manufacturer but which are not produced in Australia.

MARKET CONDITIONS IN THE BRITISH WEST INDIES

Trade Commissioner E. H. S. Flood

Barbados

Barbados, January 6, 1923.—The trade for last month was not quite up to expectations in some lines, though it was about the same as for December, 1921. The imports were above the average, particularly in groceries, a large quantity coming down just a little late for the Christmas trade, with the result that the stocks carried over in some of the lines were heavier than in any recent year. For the first time Corticelli products, from Canadian mills, were shown and were finding ready sale. Japanese silk imported through Canadian firms was also shown. The outstanding feature in the Christmas toy trade was that the goods were almost exclusively German and Austrian, and were in this respect a return to pre-war conditions.

Business prospects for 1923 are considered bright. The sugar crop will be above the average, and will probably yield not less than 70,000 tons.

The latest market review reports that foodstuffs and provisions are in full supply, and also an ample supply of lumber stuffs.

Trinidad

A bill to prohibit the claying of cocoa was passed during the month, to come into effect on the first of January. The practice of claying or colouring cocoa by means of clay is now of long standing. That it has been an injury to the colony's principal export was well known, the practice being condemned on many occasions by the Chamber of Commerce and the Agricultural Society. Through pressure from these bodies the Government was compelled at last to take active measures and prohibit entirely the use of clay or any colouring matter in the preparation of cocoa for the market. This legislation will undoubtedly raise the standing of Trinidad cocoa, and eventually enhance the price. The bill referred to places wide power in the hands of the inspectors of cocoa who are to be appointed under the Act, and the penal clauses provide heavy fines with cancellation of license in the event of clayed cocoa being exported by, or found in the possession of, any person or firm.

The outlook for the coming year in agricultural fields shows signs of improvement, the expectation being partly based on the looked-for establishment of an agricultural bank for which the colony has been pressing. It is believed that the price of sugar and cocoa will advance during 1923, particularly of cocoa, now that claying has been prohibited.

The trade in flour is brisk, with an ample supply. The market is well stocked with cornmeal, oilmeal, oats, butter and codfish, of which latter a drop in the price of Nova Scotia is noted.

Shipments of cocoanuts and copra during December were above the average. Copra shipments for the year have established a record, with an advance in price during the month. Oil and asphalt also showed an increase for the year.

British Guiana

Business among the stores in Georgetown was reported as fairly good during December, as considerable money was in circulation owing to the fact that the sugar and rice crops were being reaped, and to a large amount of money having been brought into town by the diamond miners. Diamond mining was very successful during the year, the total production to the end of November valuing nearly $3,000.000.

The sugar estates have been grinding for some time past. The crop is reported as short, due to the heavy rainfall experienced during the early part of the year, and will hardly realize over 85,000 tons. The excessive rainfall also affected the rice fields, which will shorten the crop to the extent of about 30 per cent.

The provision market is reported to be in good supply. The low price of rice has increased the consumption of the commodity at the expense of imported foodstuffs, but with the small crop expected for next year, conditions in imported foodstuffs should improve. The supply of fish is ample for British and Newfoundland cod, and for Nova Scotia pollock. Heavy stocks of fish generally are reported, the demand being rather poor.

POTATO MARKET IN THE UNITED STATES

Frederick H. Palmer, Assistant Trade Commissioner in the United States

New York City, January 26, 1923.—The past year was a most remarkable one in North America with respect to agricultural production, and as a result of the most extraordinary yields, which built up immense stocks all over the country, 1922 growers of potatoes are finding it almost impossible to market their harvests of this commodity.

Some idea of the quantity of potatoes in the United States, for which growers and commission houses, in common, are trying to find a market, domestic or foreign, may be gathered from the statistics of the United States Department of Commerce, which record a yield for 1922 of 438,000,000 bushels as compared with the 1921 yield of 346,823,000, or an increased production of over 26 per cent.

As the possible consumption of potatoes is a matter which permits of fairly close estimates being made, the realization of the size of the 1922 supply in September began to cause those interested in distributing the crop some concern as to prices. Despite the fact that consumers were able to buy more potatoes than was expected, as a result of increased employment at very good wages, the situation for distribution has become increasingly difficult.

Naturally this condition of affairs reflects back to the growers and is resulting in lowered prices. The recent slump in the potato market is being given as the reason for the filing in Portland, Maine, of an unusual number of bankruptcy schedules by farmers of Aroostook and other eastern counties where potatoes are a staple crop, notwithstanding the fact that in Maine there was a local shortage in production; the estimated yield of 22,680,000 bushels of potatoes being only 61 per cent of the 1921 crop, but which was easily offset by the heavy crops in adjacent states.

EUROPE'S SUGAR PRODUCTION IN 1922

Sugar experts now maintain that this year's output in Europe—of course, exclusive of Russia—will certainly be no less than 17 per cent over and above last year's output, says *Kelly's Monthly Trade Review;* and, generally speaking, all over the Continent the roots have been better shaped and richer in sucrose than for the last three years. On the other hand, there is a certain decline in several countries as compared with last year's—in Denmark nearly 25 per cent, in Hungary 15½ per cent, in the Netherlands 25½ per cent, and Sweden as much as 71 per cent; but as regards France and [illegible] the production of raw sugar from beets will probably exceed by 310,000 tons last year's figures. It is stated that in Czecho-Slovakia the output will be about 97,000 tons raw sugar in excess of last year's, owing to very favourable weather during September.

RESTRICTION OF RUBBER PRODUCTION IN BRITISH MALAYA AND CEYLON

TRADE COMMISSIONER P. W. WARD

The Rubber Restriction Bill has been passed by the Straits Settlements Government and came into force as from November 1. Strong hopes for the conservation and enrichment of the industry are bound up with it.

The bill is based on Scheme II of what is known as the Stevenson Report; one of the chief aims being apparently to stablize the price of rubber at something over 1s. 3d. but below 1s. 6d. per pound. The countries coming under the scheme are British Malaya and Ceylon, but it is anticipated by the fathers of the scheme that legal enforcement in the two countries named (with a somewhat questionable voluntary co-operation in the Dutch East Indies) will raise the price of rubber to 1s. 3d. within six months, absorb the whole of the existing surplus stocks within twelve months, and in that time provide the Ceylon Government with a revenue of £280,000 and the Malayan Governments with £1,250,000.

The amount of rubber which the regulations allow each estate to export is 60 per cent, based on the output of such estate during the twelve months from November, 1919, to October, 1920; the export duty on this amount is 2 cents per pound. The Straits Settlements territories of Singapore, Penang, Malacca, the Province Wellesley, and the Dindings are free of this tax if their rubber shipments have been imported by sea.

The Government retains to itself the right to raise or lower the 60 per cent restriction of production in order to maintain the price at 1s. 3d., or thereabouts. There are also special rules and arrangements for native estates, small holdings and newly tapped areas. Local committees are being formed for the purpose of deciding any questions which may arise. If more than the 60 per cent is exported, the duty over the whole production is increased to 14½ cents, while for each additional 5 per cent production the extra duty is 3½ cents over all.

Complaints have arisen that no provision is being made for granting financial help to the poorer estates; but it is claimed that there will be very little need of such help. An illustration is given of an estate producing 10,000 pounds and selling at 25 cents per pound, the revenue being therefore $2,500. In November that estate will be allowed to produce 6,000 pounds, and if it sells at 40 cents the revenue will be $2,400.

The Stevenson scheme is considered by many to be defective insomuch that it restricts exports but leaves production free, and it is suggested that some plantations will produce their 100 per cent as before, and the excess rubber will be stored until the restriction ordinances disappear. Another opinion is that an enactment should be passed making it possible to produce more than the 60 per cent, using the surplus quantity for manufacturing purposes in Malaya, duty free. One or two companies, and at least one big estate, have started business in a small way, but in competition with imported articles from factories with the advantage of years of experience and expert guidance, the only point they score on is cheapness of raw material. There are at present Malaya-made rubber shoes, mats, belts, and sundry articles, and motor car and cycle tires, but their total sales are almost insignificant.

[The rubber ordinances and amendments of the Straits Settlements and the Federated Malay States are on file at the Department of Trade and Commerce, Ottawa, and may be consulted by interested Canadian firms on application to the Director, Commercial Intelligence Service.]

TRADING POSSIBILITIES IN HOLLAND FOR CANADIAN PRODUCTS

Trade Commissioner Norman D. Johnston

The Market for Canned and Preserved Fruits and Vegetables

[*This is the fourth of a series of reports by Mr. Johnston on Trading Possibilities in Holland for Canadian Products. The first, on Grain and Feeding Stuffs, was published in "Commercial Intelligence Journal" No. 982; the second, on the Demand for Flour, in No. 984; and the third, on Dried and Evaporated Apples, in No. 991.*]

Canned Fruits

Rotterdam, January 8, 1923.—Canadian canned fruits are practically unknown in Holland, and providing Canadian firms will cater to the requirements of the market in the method of packing, grading and terms, it would appear possible for Canada to obtain a share of the trade. Californian products almost monopolize the market and are very popular in the Netherlands. It cannot be said that the canned fruit trade is very large in Holland as such products are looked upon as luxuries, and the Dutch people do not use canned fruits in a large way such as is done in Great Britain, for instance. Fresh fruits and vegetables are also obtainable in abundance in Holland. There is, however, a good amount of business done which would be worthy of the attention of Canadian firms, as the appended tables indicating the quantity and value imported into Holland in 1921 from the main countries of supply will show:—

Imports of fruits preserved in syrup or sugar without regard to packing:—

	Quantity Kg.	Value Guilders
Germany	9,433	6,026
Belgium	29,109	33,911
Great Britain	33,993	19,553
France	61,786	84,401
United States	63,374	52,371
Netherlands East Indies	7,983	5,328
Spain	16,167	11,721
Argentina	13,558	13,783
Total	243,698	233,152

Imports of fruits preserved in cans, tins, bottles and similar small packing n.m.s.:—

	Quantity Kg.	Value Guilders
Belgium	61,594	39,482
Great Britain	95,243	74,746
France	27,045	20,203
United States	347,972	270,230
Netherlands East Indies	38,336	28,251
Spain	39,414	16,798
Malacca	72,938	45,332
British India	15,817	10,667
Argentina	4,745	5,708
Total	710,735	518,154

PRESENT CONDITIONS

In the opinion of many in the trade, the consumption of canned fruits is growing in Holland, and the preliminary statistics for 1922 seem to indicate that this is the case. Notwithstanding the fact that business and trading conditions have been bad in the Netherlands during the past year, the imports into Holland for the eleven months ending November of fruits preserved in cans, tins, bottles and similar small packing amounted to about 816,000 kilogrammes with a value of approximately 498,000 fl., as compared with 652,000 valued at 480,000 fl. during the same period of 1921. Of these imports last year, by far the largest part came from the United States, namely about 445,000 kg. The Netherlands East Indies supplied about 78,000 kg., Great Britain and Malacca each 66,000 kg., Spain 50,000 kg., and Belgium 36,000 kg. It is probable that a considerable portion of the imports from Great Britain comprised Californian canned fruits as, where the importer does not wish to contract too far ahead or to buy in large quantities, a favourite practice in Holland is to buy from firms in Great Britain where very reasonable quotations can be obtained as the English firms buy in such large quantities that they are able to obtain the lowest possible prices from canned goods exporters in the United States and other countries.

The imports of fruits preserved in syrup or sugar, without regard to packing, during the eleven months of last year amounted to about 118,000 kg. valued at 115,000 fl.

PRICES

As has been stated, general trading conditions have not been very good in Holland this last year, and under such a situation under-selling and price-cutting takes place to a much greater extent than under normal conditions. Californian fruits have therefore been offered last season by one importer at ridiculously low prices, his prices for tins of 2½ pounds being 0.98 fl. (39 cents) for apricots, 1.03 fl. (41 cents) for peaches, and 1.12 fl. (45 cents) for pears per tin. When the duty of 25 fl. per 100 kg. is taken into consideration, it will be realized how low this price is. It has been suggested, however, that this canned fruit is offered at what are considered unremunerative prices in order to introduce the brand and get it well known in all the retail shops. It is not likely that such prices will remain in the future. In the above case the importer has the sole sale for this brand and buys in large quantities in order to retain this position. It is thought by most that this year will see much better business in canned fruits at more remunerative prices in the Netherlands.

REQUIREMENTS

The principal demand for imported canned fruits is for apricots, peaches, pears, and pineapples. Cherries and the smaller fruits are grown and bottled or canned in Holland. In the writer's opinion Canadian canned pears will compare favourably with those from any source and should, when once introduced, find a good sale in Holland provided the prices are equal and, if possible, lower than those for the Californian pears. In the case of peaches it may be more difficult to develop a business as the greater amount of juice in the Canadian peach may cause the appearance to compare unfavourably with the Californian peach when turned out into a dish, but if greater care will be taken in grading the Canadian peaches for canning purposes, the much better flavour of the Canadian peach should gradually find its place in the market. Price as well as quality is of course a big consideration.

CANS AND LABELS

Cans of 1 pound and 2½ pounds are mostly used for the sale of Californian fruits in Holland, 48 tall tins of the former and 24 of the latter to a case.

The proportion of 2½-pound tins of fruit consumed is probably slightly greater than for the 1-pound tins. One-litre tins are also used, and with regard to pears, large Californian pears packed four in a litre tin meet with approval.

In most cases it will be best for Canadian firms to sell the fruit under their own brand labels, as people in Holland generally feel that there is a greater guarantee of quality if the packer's own labels are used. This method is also advantageous if it ever becomes necessary through circumstances to change the firm of agents in Holland after the brand has become known. Business is, however, sometimes done under the agents' or importers' own labels and if desired can be adopted, but the only thing against this method is that it is their brand labels which become known and not the packer's, which creates a difficulty if a change of agent should become advisable. The cost of printing labels is also high in Holland.

DUTY

The duty on importation into Holland on fruits in hermetically sealed cans, whether with or without sugar, is 25 fl. per 100 kg, while the duty on fruit preserved in sugar, but not imported in hermetically sealed containers, is 18 fl. per 100 kg.

FRUIT MASH, JAMS, JELLIES AND FRUIT PULP

Fruit mash, jams, and jellies are made extensively in Holland, but Great Britain does quite a good trade in some of her well-known brands. In 1921, out of a total importation of fruit mash prepared with sugar, jams and fruit jellies of 78,280 kg. with a value of 52,173 fl., Great Britain supplied 55,522 kg. valued at 36,917 fl., while in 1920, when the imports were larger, Great Britain furnished 108,273 kg. valued at 90,333 fl. out of a total importation into Holland of 132,564 kg. with a value of 107,702 fl., Germany supplying 17,211 kg. valued at 10,912 fl.

On the other hand, an idea of the manufacture and export trade of Holland in these products may be gleaned when it is mentioned that the Netherlands exports in 1921 amounted to 2,559,677 kg. with a value of over 1¼ million guilders, most of which went to Germany—namely 1,965,392 kg.—the remainder going mostly to Poland, Netherlands East Indies, Turkey, Great Britain, Belgium, and the United States in order of importance as to quantity shipped. During the first eleven months of 1922 the total imports amounted to about 46,000 kg. with a value of 26,000 fl., while the exports were about 464,000 kg. valued at 241,000 fl.

It will be somewhat difficult to compete with the Dutch productions and the high-class well-known English lines, but it is largely a question of quality and price, and if Canadian firms can supply good-quality brands at competitive prices, while the trade may be slow at first when introducing the brands, there would appear to be no reason why a good trade should not be developed in Canadian products, as large quantities are used in the Netherlands.

In the case of fruit mash prepared without sugar and fruit pulp, Spain is by far the largest supplier of Dutch imports, having shipped in 1921, 905,258 kg. valued at 235,117 fl., out of a total importation of 1,093,312 kg. with a value of 288,920 fl. Great Britain furnished 64,401 kg., Greece 27,025 kg., the United States 25,111 kg., and Belgium 23,301 kg. On the other hand, Holland exported 10,092,401 kg. in 1921 valued at 3,722,731 fl., of which the greater part—namely 8,429,492 kg.—went to Great Britain, 877,913 kg. to Germany, and the remainder to Poland, France, Ireland, Belgium, Argentina, Switzerland, and the Netherlands East Indies. During the first eleven months of 1922 about 943,000 kg. with a value of 266,000 fl. were imported, and about 8,932,000 kg. valued at 2,806,000 fl. were exported, most of which went to Great Britain and Ireland.

The same remarks apply in connection with fruit pulp and unsugared mashes as were mentioned in dealing with jams, jellies and sugared fruit mashes, that competition for Canadian products will be severe, but if samples, prices, terms and necessary details are sent to the Canadian Trade Commissioner, all possible help will be given to get the Canadian concern in touch with the most suitable agents, the appointment of such being the best way to develop a business, and it is hoped a good trade may be inaugurated.

Canned Vegetables

While Holland is a large grower of vegetables of all kinds and cans these products on an extensive scale, certain quantities and kinds are imported, and although the trade in imported canned vegetables cannot be said to be very great, nevertheless a considerable business is done which is well worth consideration. Fresh vegetables are generally available, and canned vegetables are considered a luxury. Dutch people do not as a rule lay in a large store of canned goods as is the custom in Canada, but buy only what is required daily. A private winter's stock of 50 tins of vegetables is considered large in Holland. It must not, however, be thought that business is not done in these lines because, although the people do not lay in a stock, the more well-to-do families are constantly buying such canned goods.

SOURCES OF SUPPLY

Germany is the largest outside source of supply and sells to Holland canned peas, asparagus, haricot beans and other vegetables. In 1921 she supplied Holland with 209.424 kg. of vegetables preserved in cans, tins, bottles and similar small packing, valued at fl. 82,126 out of a total importation of 591,741 kg. with a value of 413,574 fl. French high-class canned vegetables, particularly peas and beans, are very popular, and France was therefore the next largest supplier with 120,410 kg., which had a higher value than the larger quantity of German vegetables, namely 130,099 fl. Belgium furnished Holland with 89,332 kg., Italy with 52,268 kg., the United States with 45,620 kg., Great Britain with 41,456 kg., Spain with 15,365 kg., and Argentina with 14,518 kg.

This last year the imports have not been quite as large on account of the fact that quantities of fresh fruit and vegetables have been available due to the impossibility of exporting the usual quantities to Germany, where the fall in the value of the mark did not allow them to buy from Holland. Nevertheless about 391,000 kg. valued at 283,000 fl. were imported during the first eleven months of 1922, the higher class canned vegetables coming from France to the amount of about 85,000 kg. valued at about 102,000 fl. Germany supplied about 87,000 kg. with a value of 36,000 fl., Italy approximately 80,000 kg. valued at 46,000 fl., the United States 47,000 kg. valued at 44,000 fl., Great Britain 36,000 kg. with a value of 25,000 fl., and Belgium about 26,000 kg. valued at 13,000 fl.

CARE NECESSARY IN PREPARATION

As will be noticed in the above figures, the United States did quite a nice business in canned vegetables, and it would therefore seem that Canada should be able to obtain a share of the trade if attention is paid to the proper methods of grading, packing, seasoning, cooking and selling suitable to meet the requirements of the market.

In the case of peas, for instance, the criticism has been offered that the Canadian tinned peas are not sufficiently salty and are not cooked long enough, while there are too many yellow and burned peas in the tins of green peas. It has also been stated that sufficient care is not given to grading as to colour and

size. In Holland the canners place a small piece of leek among the peas while they are being boiled and which is removed afterwards, while the French manufacturers also put in a little sugar which is liked very much. In endeavouring to develop an export trade to Holland these matters will have to be given serious consideration by Canadian vegetable canners.

SIZE OF TINS AND GRADES

Small tins of vegetables find a much larger sale in Holland than the larger tins. For instance, the Dutch tins of $\frac{1}{4}$-, $\frac{1}{2}$- and 1-litre sell in much the greatest quantities while there is some trade in 2- and 3-litre tins. A Dutch litre tin weighs with peas and water about 1,020 grammes, $\frac{1}{2}$-litre tin 550 grammes (peas 260 grammes), and $\frac{1}{4}$-litre 300 grammes.

There are usually five qualities: Superior, No. 1, No. 2, Cook and Household or similar grades. In each grade the three smaller sizes mentioned above find the heaviest sale, while the two larger sizes are sold in certain quantities principally to hotels and restaurants.

BUYING SEASON AND PRICES

The buying season for canned vegetables generally commences in May, when the importers and wholesalers make their arrangements. The goods are then offered to their customers in June and July for delivery in August or thereabouts, so that it would be wise for Canadian exporters interested to make their export plans as soon as possible and get their connections established in order to be in the market as early as possible after the opening of the buying season.

It is impossible to give any idea of future prices, but during the last buying season Dutch 1-litre tins of extra fine quality peas were offered to the retailers at 1·20 fl. (48 cents) and $\frac{1}{2}$ tins at 0·65 fl. (26 cents), fine quality whole tins at 1 fl. (40 cents), and $\frac{1}{2}$ tins at 0·55 fl. (22 cents), and No. 1 whole tins at 0·80 fl. (32 cents), and $\frac{1}{2}$ litre tins at 0·45 fl. (18 cents), delivered free when more than 50 guilders ($20.10) worth is bought at a time. German canned beans were also offered to the retailers at 0·60 fl. (24 cents) per one-litre tin and 0·35 fl. (14 cents) per $\frac{1}{2}$-litre tin.

SELLING ARRANGEMENTS

In the case of all of these products, the only way to introduce the new brands and work up a good trade is to appoint a reliable firm as sole representatives in Holland. By this means the agents will have an active interest in pushing the sale of the articles and can keep them constantly before the attention of all prospective buyers. A good-sized stock of samples should be sent after representation arrangements have been made so as to enable the agent to distribute and demonstrate the quality of the products.

It may be advisable, when a reliable agent has been appointed, to send a small shipment on consignment, so as to have a small stock on the spot to better help the introduction of the new brands by being able to supply small lots at a time at first until the qualities of the brands are known. When the business has once become established, the main orders would be shipped direct to the importers.

The usual agents' commission is 3 per cent or $3\frac{1}{2}$ per cent according to whether cable expenses are chargeable to the sellers' or agents' account.

Quotations should be sent per dozen cans c.i.f. Dutch ports and payment sight draft on buyers against documents Holland, the prices to include the agents' commission of 3 per cent or $3\frac{1}{2}$ per cent as the case may be. Prices can be sent in Canadian dollars as the exchange rate is more or less steady and the relative amounts can be easily computed. It would, of course, help to have prices in guilders, but this is not absolutely necessary.

The duty on canned vegetables on importation into Holland is 25 fl. per 100 kg.

In conclusion, let it be pointed out that competition is undoubtedly severe in these canned products, and in order to get going in the market the Canadian prices will have to be cut down as low as possible at first, so that the price may be an inducement to buy the new brand rather than the older accustomed brands. To reiterate, Canadian fruits and vegetables are practically unknown, but if price can be made an inducement at first the trade will come much easier later on when the excellent quality of the Canadian packs become evident. If Canadian firms interested in developing the Dutch market will communicate immediately with the Canadian Trade Commissioner, sending samples, prices, terms and every necessary detail, particularly an idea of the policy it is desired to pursue, they will be put into touch with the most likely firms, and all possible help will be given to get the trade in the Canadian products started in the right way to the Netherlands.

GERMAN GRAIN TRADE SITUATION

Trade Commissioner L. D. Wilgress

Hamburg, January 10, 1923.—After a short period of comparative quiet, Germany has again commenced actively to purchase grain. Most of the buying is on Government account. Fairly large quantities of rye have been purchased since the new year, but the Government is restricting its orders for wheat to the minimum amounts necessary. Some business in hard wheat is, however, being done with the flour millers. Hamburg grain firms report that a fair share of the orders placed are for Canadian rye and wheat. The Government in the last few days has purchased considerable quantities of Canadian rye. The superior grades of Canadian wheat are, however, stated to be too dear for the German market.

Owing to the poor results of last season's harvest, it is reported that Germany has to make up, by importation, a deficiency of approximately 2,500,000 tons of grain. The Government has already covered a large proportion of this deficiency by purchase from abroad, but about half still remains to be secured. Grain dealers report the approaching exhaustion of local stocks, so that up to the next harvest increasing reliance will have to be placed upon importation from abroad and upon the Government supplies.

GOVERNMENT BUYING OF GRAIN

In order to obtain foreign grain and to assure cheap supplies to the mass of the people, the German Government have organized a limited company known as the Import Company for Grain and Fodder (Einfuhr Gesellschaft fuer Getreide und Futtermittel m.b.H.). All the purchases of foreign grain on Government account are made through the intermediary of this company. In no case does the company deal direct with foreign exporters, but always buys through German grain firms. The reason for this is stated to be the desire of the company to deal with firms on the spot, whom it can hold responsible for fulfilment of contract, and also the wish not to interfere with the established channels of trade. The company, however, requires to know the name of the foreign supplier in each case. The head office of the import company is in Berlin, but there is an office in Hamburg which places orders after daily telephonic conversation with Berlin.

Before the war Hamburg was the chief centre of the German grain trade, followed by Berlin, Duesseldorf and Mannheim. With the establishment of the Import Company in Berlin most of the Hamburg firms have found it necessary

to establish offices in that centre. The importance of Mannheim as a grain centre has relatively decreased, with the loss of Alsace-Lorraine to Germany, and more direct buying of grain by Switzerland. Duesseldorf and Mannheim being situated on the Rhine secure the bulk of their supplies through Rotterdam.

The articles of the Import Company require that 70 per cent of the total amount of grain ordered shall be imported through German ports, the remaining 30 per cent through Rotterdam.

The offices of the Import Company in Berlin and Hamburg receive daily quotations from the German grain importers, who have their connections with the foreign exporters. Prices are usually quoted in Dutch gulden. Orders are placed after consideration of the various quotations. Extreme caution and vigilance characterize the buying of the Import Company and the commissions of the German firms are cut very fine. All contracts are placed in accordance with the terms of the London Corn Trade Association's grain contract for shipments to the Continent. It is understood that cash in New York on date of arrival of the shipment has been the customary terms of payment for grain sold to German firms, but that the leading importers have been seeking thirty days or longer.

CANADIAN CONNECTIONS

Interviews with the leading Hamburg grain importers revealed the fact that some of the old-established firms have no direct Canadian connections, and are dependent upon New York houses for their quotations on Canadian grain. There would therefore appear to be openings for Canadian grain exporters who wish to have a connection in Germany. The German firms express the opinion that Canada will be more and more a ruling factor in the supply of grain to Germany during the coming months, and Canadian connections are desired for this reason. By submitting regular cabled quotations to German firms, Canadian exporters would be assured of their prices being placed before the Import Company which buys foreign grain for the Government.

GERMAN SHORTAGE OF CAPITAL

The continuous and widespread advance in prices has aggravated the scarcity of working capital in Germany to such an extent that large sections of trade and industry are demanding payment of bills within a fortnight, and some firms even within a week, writes a correspondent in the London *Times Trade Supplement*. In a number of industries prices have reached the world's level, and increasing quantities of foreign goods are appearing on the German market.

The iron and steel industry has repeatedly been accused of advancing prices more than increased cost would warrant. It is alleged that the firms in this industry are taking advantage of the present scarcity of iron products to make undue profits, thus sending up the prices of all other manufactures, to the detriment of the general economic condition of the country. The policy of the Steel Combine is strongly criticized, and it is pointed out that some of its prices are even above those of foreign manufacturers, who have to reckon with much higher cost of production. Under conditions of a stable or improving exchange, it is pointed out, the German manufactured article would find it almost impossible to compete abroad. Producers assert, however, that as payment in most cases is made some weeks after delivery, prices would have to be high enough to compensate for the losses incurred during this period through the declining exchange. They also point out that the price of imported ore has considerably advanced.

THE ITALIAN SITUATION

Trade Commissioner W. McL. Clarke.

Milan, January 4, 1923.—The Fascisti Government has not been long in getting into harness and already important economic reforms have been put through. The interest on loans and bonds issued abroad has been exempted from a taxation heretofore fixed at 25 per cent; the tax on personal property has been extended to landowning farmers and to the workers employed in state factories; the tariff on wheat flour has been reduced to 47 gold lire per metric ton and on rye, oat and maize flour to 2 gold lire per metric ton; increased postal rates have been introduced; the stamp taxes on wines, perfumery and jewellery have been simplified and reduced; arrangements are being made for closing down the Ministry of Liberated Territories and for amalgamating the Departments of the Treasury and of Finance; a High Commissioner of Railways has been appointed, and unloading in the ports of Genoa and Naples has been considerably speeded up. The energetic and business-like way in which Mussolini is tackling the national problems, together with the practical cessation of internal disorders, is meeting with general approval, and the prime minister is actuating that same programme which out of power he had been persistently crying up.

Due mainly to seasonal conditions in agriculture and the building trades, the number of unemployed rose over 33,000 during the month of November and on December 1 stood at 354,238. There is recorded a slight improvement in the mining, textile, metal, chemical and engineering industries during the month of November. Strikes are at present virtually non-existent.

The sowing of winter wheat is being effected under normal conditions and germination is regular. Rain is, however, required in the islands and in the south.

Invested capital in joint-stock companies rose 92 million lire during November, although business failures still kept on increasing and amounted to 336 for the month of November as compared with 184 a year ago. The latest monthly statistics of the Issuing and Commercial Banks show a falling off in deposits of some 7 million lire, and a reduction in discount business of some 153 million lire. Clearing house receipts on the other hand were some 18 million higher for October than for the preceding month. Note circulation increased 223 million lire during the month of October, while state revenue was 142 million lire higher during July-November, 1922, than throughout the corresponding months of the preceding fiscal year.

Italian imports totalled 7,746 million lire during the first six months of 1922 and exports some 4,198 million lire. The unfavourable trade balance was, however, 1,235 million lire less than during the same six months of 1921.

From December 1 the lire improved from 20.77 to the United States dollar to 19.67 on December 30.

The various commodity markets, with the exception of those of wool and grain, have shown little animation during December, a fact which may be partially explained by the hesitation of buyers who look forward to lower exchange rates and hence lower foreign prices. It is reported that the improvement in the lire is beginning to make itself felt in a slight falling off of Italian export trade.

With but few exceptions security prices sagged considerably during December. Of the 78 quoted on the Milan Bourse, 21 moved up 212 points, 47 fell 732 points, and 10 remained stationery.

Wholesale prices at Milan dropped 3·3 per cent during the month of December.

CUBAN MARKET FOR CERTAIN CANADIAN PRODUCTS

J. L. Gonzalez-Hoyuela, Office of the Canadian Trade Commissioner

Havana, January 15, 1923.—*Codfish,*—Market easy and steady, with slow demand. Some improvement is expected shortly on account of the Cuban sugar grinding season being in full swing. The arrival on this market of large consignment shipments from Norway has kept prices down. Canadian codfish is sold at $10.50 per case, delivered, and Norwegian cod from $11.50 upwards.

During the month of December of last year there arrived in the port of Havana codfish from the following countries: United States, 110 cases; Canada, 2,150 cases; Norway, 9,566 cases; Scotland, 1,225 cases; a total of 13,051 cases. There are close to twenty-five Norwegian shippers of codfish to the Cuban market.

As may be seen from the figures given, Canadian exports of codfish to Havana during last December do not reach one-fourth of the Norwegian exports during the same period. This is due principally to two reasons: first, that the majority of Norwegian shipments are made on consignment; and, second, that Canadian exporters have not taken steps to remove the black nape on the fish, in spite of recommendations to that effect from this office on more than one occasion. Canadian shippers and exporters of codfish should spare no effort in order to retain their place in the codfish trade with Cuba. They are undoubtedly in a much better position than Norway, on account of proximity and for other reasons, to compete in this market.

Potatoes.—This market has remained steady during the last week. Sales are being made on the basis of $2.75 to $3 c.i.f. Local stock is estimated at some 18,000 bags, with some 20,000 bags afloat. The local potato crop, raised in the Guines district, is now expected on the market, and it is said to be quite abundant and of very good quality. Due to this reason, the market is rather weak and is expected to continue so for some time yet. Recently there have been arrivals of English potatoes (some 4,000 bags), and also a shipment from Holland. These have arrived in good condition.

Wheat Flour.—The local market is very well stocked in this commodity. It seems that some local importers made purchases of Canadian flour at rather reduced prices, and competition is almost impossible on this account. Canadian spring wheat flour is being sold at $7 c.i.f., and the same quality of American flour at $8.

Canadian millers of hard wheat flour who desire to extend their export operations to the Cuban field should now be on the alert and communicate immediately with the office of the Canadian Trade Commissioner. The use of Canadian wheat flours is becoming more popular every day in Cuba, and there are a large number of reliable and active agents and brokers looking for a Canadian connection. Their names and addresses may be had on application to this office.

Hay.—There are large local stocks of this article. Although Canadian hay is offered at from $23 to $25 per ton, as compared with $25 to $27 for United States hay, there is little demand. While the present American stock which was purchased at a high price is on hand it is not believed that any important transaction may be effected.

Oats.—No sales of Canadian oats can be effected at present. American oats are being offered at from 58 to 60 cents per bushel, and Canadian at from 68 to 70 cents.

FINANCIAL CONDITIONS IN BRAZIL

Trade Commissioner E. L. McColl

Rio de Janeiro, January 5, 1923.—The present financial state of Brazil and the consequent lack of confidence is one of the chief factors causing the present continued weakness of the milreis. For the first ten months of 1922, the last figures available, imports and exports show a favourable balance of trade of approximately $75,000,000. There are, however, invisible unfavourable balances which much more than offset this amount. These are the foreign remittances for the payment of interest on the external funded debt, which amount to approximately 300,000 contos ($33,000,000); remittances on foreign invested capital; payments for ocean freights, insurance and other items not shown in trade returns. The budget for the current year will probably show a deficit of $20,000,000. Whether this will be raised by a foreign loan or a fresh issue of paper money is not known, but owing to the attitude of the Brazilian Government in its relationship to the Bank of Brazil, of which it owns 51 per cent of the stock, it looks as if the latter method might be adopted. The Government intends to transfer to the Bank of Brazil £10,000,000 in payment of a loan of 300,000 contos. The bank may issue notes against this gold. Brazil is a young country, and during the last few years it has undertaken to build good roads, irrigation works, new ports and railways in the expectation of being able to reach in a short period the same state of development over which older countries have laboured for hundreds of years. Brazil has undoubtedly gone beyond her immediate resources, but from the past record of the President in his administration of the State of Minas Geraes, and in the choice of his ministers, there is little doubt that in the end he will bring the country safely through what appears to be at the present moment a bad state of affairs. The present Government has adopted stringent measures for the curtailment of expenses and for the increase of revenue, and when it is seen that an originally estimated deficit in this year's budget of 200,000 contos has now been reduced to approximately 125,000 contos, it is hoped that it will continue its policy with a firm hand and not be influenced by the criticisms which are being levelled at it by some of those most directly affected by these economies. It is to be regretted that the immediate future of the milreis does not look bright.

IRELAND PLANS HYDRO-ELECTRIC DEVELOPMENTS

Organization of the Irish Power Syndicate (Ltd.) has been effected, following investigations into the water-power resources of the country by the Irish commission of inquiry, says the United States *Commerce Reports*. The new company, with its headquarters at 28 Molesworth street, Dublin, plans to utilize a portion of the water-power of the Liffey river and has applied to the Ministry of Industry and Commerce of the Irish Provisional Government for a special order in accordance with the legal regulations, to enable it to take the necessary steps to acquire sites for power stations and rights of way for transmission lines.

The total effective horse-power of the Liffey is estimated at 8,300, if the six available sites for generating stations are fully developed. The new company plans to establish two generating stations—one at Bishopsland and the other at Downing's North—both in the County Kildare, about 25 miles south-west of Dublin. It is proposed to convey power from these stations by overhead transmission lines to the boundaries of Dublin, and thence underground into the city. The company intends to supply power to authorized distributors along the route of the transmission lines and in the districts of Dublin which do not now have electric-power facilities.

THE IMPORT TRADE OF CHILE

Trade Commissioner B. S. Webb, Buenos Aires.

[*This is the fourth of a series of reports on the Markets of Chile. The first, which dealt with Textiles, Agricultural Machinery and Implements, and Iron and Steel Products, was published in No. 989; the second, on Transportation Material, Industrial Machinery and Supplies, Tools and Hardware, appeared in No. 990; and the third, on Chemicals and Drugs, Electrical Goods, Footwear, etc., was published in the last issue (No. 991).*]

FOODSTUFFS

Salmon is one of the few kinds of canned fish imported into Chile on a large scale. The importation of canned salmon during 1920 amounted to 2,353 tons, practically all of which is entered as of United States origin, Canada being credited with only 176 tons. The large merchant houses distribute canned salmon under their own brand. The demand is almost entirely for 1-pound tall reds; pinks and chums are not sold to any extent.

Condensed milk is made locally to a large extent, but the capacity of the local plants is not sufficient to supply the whole demand when the nitrate plants are working, and certain quantities have to be imported. Some 391 tons were imported during 1920, 346 tons from the United States and 34 tons from Great Britain.

Dried fish was imported in 1920 from Norway (136 tons), Japan (110 tons), United States (76 tons), and the United Kingdom (41 tons). Boneless dried cod comes in sealed tins of 10, 23 or 46 kg. packed in wooden cases.

WOOD AND WOOD PRODUCTS, PULP AND PAPER

Lumber.—Importation of lumber during 1920 amounted to 1,152,000 square metres, practically all of which came from the United States. Lumber importations are not classified in the Customs statistics, but practically all of the lumber imported is known to be Oregon pine, chiefly seconds, the price of the first quality being too high for the market. Lumber is almost invariably imported in cargo lots. Parcel-lot shipments being comparatively rare. The National Shipping and Lumber Company of Valparaiso sends its own ships up the Pacific coast for the purpose of bringing down lumber. From inquiries made in Valparaiso, it appears that only two lots of Douglas fir from British Columbia have arrived during the past two years.

Handles are not imported to a very large extent, due to the fact that the artisan of Chile usually prefers to make his own handle, and also to the fact that they are made to a certain extent in local factories. Of the 175 tons imported during 1920, 150 tons were from the United States and 23 tons from the United Kingdom.

Chairs.—Kitchen chairs of the cheapest types are imported from the United States and Germany, imports from the former country having amounted to 115 tons in 1920 as compared with 11 tons from Germany. There are fairly large furniture factories in the south of the Republic and the demand for imported chairs will never be very great.

Wooden heels were formerly imported from the United States, but are now being brought in from Germany, the German article being the only one which can compete with the type of heel now being made in the local factories. Practically all the boot makers in Chile are of French extraction and favour French

styles. The following quantities were imported during 1920: from the United States, 6,365 kg.; from Germany, 815 kg.; from Argentina, 1,101 kg.; from France, 147 kg.; total, 9,228 kg.

Wood pulp.—Of the 1,170 tons of wood pulp imported during 1920, 797 tons were from Sweden, 141 tons from Norway, and only 233 tons from the United States. It is imported by the local paper mills for use in the making of cheap wrappings, this being practically the only paper made in the country.

Newsprint.—The importation of this commodity amounted to nearly 17,000 tons during the year 1920. Full particulars of the Chilian market for newsprint are contained in a report on the subject published in *Commercial Intelligence Journal* No. 967 (August 12, 1922).

Cardboard.—This was imported to the extent of 236 tons in 1920, 151 tons of which were of United States origin. Of the remainder 53 tons came from Sweden, 20 tons from Germany, and 12 tons from Holland. Cardboard comes packed in strapped bales of light weight, customs duties being levied on the gross weight of the package.

Sheet news.—There is a fairly large demand for sheet news which, in Chile, is used for the printing of country newspapers, for poster work and for biograph bills. It is imported in sheets 77 by 110 centimetres, weight 43 grammes, 500 sheets to a ream and 10 reams to a bale. Norwegian exporters supplied 268 tons of sheet news during 1920, and Swedish exporters 311 tons. Of the total quantity imported (893 tons), only 241 tons came from the United States. Large quantities of sheet news are now being received from Finland, a country which formerly did not figure in the customs statistics as a supplier of sheet news.

Printing papers, sized.—The total importation for 1920 was 169 tons, of which quantity 95 tons came from the United States, 56 tons from Great Britain, and 11 tons from Germany.

Bond papers were imported almost entirely from the United States, the manufactuers of that country having supplied 656 tons out of a total importation of 872 tons; the balance, in almost equal proportions, was imported from the United Kingdom, Germany and Sweden. Some Canadian-made bond papers are being sold, but only to a limited extent, the prices being slightly higher than United States prices.

Paper bags.—Square-bottomed bags are imported from the United States, as this type of bag cannot be made locally to advantage. Plain and satchel bags, however, are all made in the country, there being several local manufacturers turning out bags at a price with which the imported article cannot compete. Total importation for 1920 amounted to 21 tons, 14 tons of which came from the United States and 5 from Germany.

LEATHER BELTING

Imports of leather belting in 1920 were valued at $600,000, United States and English manufacturers having contributed to this total in almost equal proportions. Belting is usually sold by the large merchant houses under their own, or the maker's brand. Riddaway's "Camel's Hair" belting is being sold, and Messrs. W. R. Grace & Co. are selling a brand called "Duxbak." In the larger sizes balata belting is preferred to leather belting. Belting is largely used in the mining and manufacturing industries.

CEMENT

Although most of the cement used in the Valparaiso and Santiago district is of local manufacture, certain quantities are imported from abroad for use

in the nitrate plants and industry in the northern provinces. Foreign-made cement can be imported into Chile without "approval," but before it can be used in connection with Government contracts the importer must establish the fact that it complies with the specifications of the Chilian University, for which purpose a certificate from this institution must be obtained. In order to obtain the certificate, a small consignment of five to ten barrels must be submitted to the university at Santiago for examination and analysis. Government departments favour the locally made cement whenever possible, and a recently issued decree makes the employment of Chilian-made cement obligatory in all public works. There is also a suggestion that the duties on imported cement, which are sufficiently high at present, are to be increased. Locally made cement is said to be of good quality but of bad colour. Some brands of American cements sold in Chile have been found to contain too much manganese and one or two brands have become unsaleable for this reason. The total importation of cement during 1920 amounted to 39,870 tons, 18,982 of which came from the United Kingdom, and 17,268 tons from the United States. Cement is imported in barrels of 180 kg., whilst the locally made cement is sold in bags of 60 kg., three of which are supposed to be equal to the contents of the barrel of imported cement.

ASBESTOS PACKING

Asbestos packing is imported for use in the nitrate plants and the manufacturing industries. It is stocked by machinery-importing houses; there do not appear to be any firms specializing in this line. Importation of prepared packing for the year 1920 amounted to 214 tons, of which 130 tons came from the United Kingdom and 78 tons from the United States. Sixty-four tons of asbestos rope packing were imported from the United Kingdom and United States, and some 36 tons of crude asbestos, practically all of which was from the United Kingdom.

BAHIA BLANCA; THE FUTURE MARKET OF SOUTH ARGENTINA

Assistant Trade Commissioner P. W. Cook

Bahia Blanca has been somewhat overshadowed by the remarkable evolution of Buenos Aires, but its recent growth and present prospects command attention by all who are interested in the development of South American markets. Already it has become an exporter of first importance, and it seems inevitable that at no distant date it must also serve as the port of entry and distributing centre for most of south and central Argentina.

Bahia Blanca is a coast city situated about 400 miles southwest of Buenos Aires. In its inception early in the nineteenth century it was a fort and trading station, analogous to the Canadian "factories" of the Hudson Bay Company. It developed slowly at first, but by 1880 had become a town of 2,000 inhabitants, by 1900 this figure had reached 25,000, and to-day it is in the neighbourhood of 100,000.

In appearance Bahia Blanca is a typical sunny Argentina city with wide well-paved streets, the inevitable plaza and the equally inevitable municipal theatre, excellent public buildings, a good tram service, branches of all the more important banks, and shops which bear comparison with many in the Calle Florida of Buenos Aires. Except during the export season it appears sleepy and inactive, but from January to March it takes on the tremendous energy demanded by the wheat shipments.

THE PRESENT IMPORTANCE OF BAHIA BLANCA

The present importance of Bahia Blanca is chiefly as an outlet for the productive agricultural and pastoral districts of southern Buenos Aires, Pampa, Neuquen and northern Patagonia. The original port and railway development was designed to relieve Buenos Aires which, as the single port of Argentina, had become congested during the wheat and wool export seasons. A glance at the map will show that in the first instance all railways led to Buenos Aires, but that more recent developments have tended to divert the exports of the southern territories to Bahia Blanca, which now finds itself served by the Mendoza line of the Buenos Aires and Pacific Railway, the Neuquin line of the Buenos Aires Great Southern Railway, and the new line of the Pacific which joins the Government line of Rio Negro at San Antonio. Thus the entire productive area of Argentina has direct service to Bahia Blanca.

As will presently be seen, this development is being carried further, and eventually Bahia Blanca is likely to become of far greater importance to the trade of the country. This is the result for which not only the railways but the exceedingly important agricultural interests of central and southern Argentina are striving, and it is hoped to make Bahia Blanca economically independent of Buenos Aires to an extent hitherto deemed impossible. With admirable port facilities and a growing population, the centre of a rich and increasingly important agricultural district, Bahia Blanca should be self-sustaining to a very great degree, doing its own trade without the medium of Buenos Aires, and importing its own requirements direct.

Up to now, the territory adjacent to Bahia Blanca has been largely agricultural and comprises some of the most important sources of Argentine wheat, wool and hides. When export in these commodities reached important proportions, the famous port of Ingeniero White—so-called after the British engineer who planned it—was built about three miles from the city itself. Subsequently the smaller docks at Puerto Mitre were erected by French capital. The Puerto Militar, situated at a distance of 12 kilometres from the city, is as its name implies a government base and is closed to general traffic. Recently the Pacific Railway concluded, at a cost of some £10,000,000, the construction of the important new dock works of Puerto Galvan. This port has accommodation for twelve ocean-going steamers with a draught of some 30 feet, is thoroughly equipped with electrically-operated plant for handling cargoes, with grain elevators capable of handling 20,000 tons of wheat per day, and with electric cranes for handling coal imports. In addition there are full facilities for the embarkation of cattle, a flour mill with a capacity of 100 tons per day, and some thirty miles of goods sidings. About 100 yards from the wharves, oil storage with a capacity of 38,000 tons has been erected for the purpose of supplying fuel to ocean vessels. While this constructional work was undertaken and completed by the Buenos Aires and Pacific Railway, the port has recently been acquired by the Buenos Aires Great Southern Railway in connection with the change of ownership of certain branch lines. Other public works recently completed or in present construction include the erection of a number of municipal buildings, subsidiary railway lines between the town and the various ports, and an extensive drainage scheme.

BAHIA AS EXPORT CENTRE

As the shipping port of an agricultural district, Bahia Blanca is a seasonable city, the affairs of which come to flood when the grain reaches the elevators, in a manner familiar to the Canadian Prairie Provinces. Crops are sold in advance to the consignment houses, or *consignatarios*, who finance the farmer during the months preceding the harvest.

By December the early oats are reaching the elevators and by January export is in full swing. In 1914 the quantity exported in the aggregate of wheat, oats, barley, maize, and wool, linseed, rye, bran, pollard, and flour, was 498,522 long tons, and in 1921, 915,503 metric tons. Wheat was exported in the latter year to the extent of 527,945 metric tons; oats, 277,623 tons; barley, 36,112 tons; maize, 34,776 tons; and wool, 21,161 tons. These are the main exports of Bahia Blanca, but minor quantities of hay, canary seed, tallow, bristles, hides and sheep skins are also exported. Butter is an important item, and in 1919 reached the considerable total of 3,869,610 kilogrammes.

WOOL

While the export of wool is not as great as might be expected, Bahia Blanca is the distributing centre for the chief producing districts of the Republic, namely Southern Pampa and Patagonia. The Victoria Wool Market, with a floor area of 484,000 square feet and a normal storage capacity of over 50,000 tons, has on occasion been forced to handle as much as 12,000,000 kilos of wool at one time. The wool is brought in from the *estancias* in bundles of 50 to 100 kilos, roughly classified and sold to the *consignatario*, who ships the greater part of it to Buenos Aires for reclassification, auction and export, either in grease or scoured and carbonized.

OIL

Much attention is at present being given to the recently discovered oil fields on the Atlantic coast south of Bahia and in the Territory of Neuquen. The exploitation of these oil fields is a most important prospect for the city. Very extensive Government and private work is being carried out, but to date without any striking results. But even a fraction of the yield which is considered a reasonable estimate will do much towards the development and expansion of Bahia Blanca and the smaller towns near Patagones and Neuquen. The production of oil in paying quantities would secure for Bahia Blanca a most enviable position by the attraction of capital, the augmentation of adjacent population, and the increase of its export trade.

IMPORTS

While the statistics given below show a considerable volume of imports, they are largely accounted for by material imported by the railways and by the companies engaged in harbour construction, and do not represent goods for trade purposes. There are some dozen or fifteen established importers in Bahia Blanca, all but three being branches of Buenos Aires houses. Thus the normal requirements of the trade are almost entirely entered at the port of Buenos Aires and reshipped by rail as and when the Bahia market requires.

Although this situation is in some measure explained by the prior establishment of the Buenos Aires trading houses, it is also due to disadvantages in direct shipping. Few steamship lines operate more than spasmodic and casual service to Bahia, and many charge a freight rate 50 per cent in excess of that to Buenos Aires, despite the fact that in respect of facilities and ease of operation the ports of Bahia Blanca are quite equal if not superior to those of Buenos Aires, and port dues are considerably lower. But this condition will certainly remain until the import demand of the city increases to a constant level which will warrant definite steamship services and the establishment of purely local trading houses.

Value of Imports into Bahia Blanca, 1914, 1920, and 1921, in Argentine Gold Pesos

	1914	1920	1921
Agricultural implements and machinery	128,620	18,663	88,649
Beverages	81,431	4,322	5,892
Building material	12,548	662,773	341,245
Colours, dyes, paints, etc.	6,941	14,390	11,621
Drugs and chemicals	174,276	58,678	56,798
Electrical material	242,386	20,615	54,477
Food products	12,031	30,434	59,025
General manufactures	12,400	11,033	9,962
Iron and its manufactures	23,718	783,369	795,724
Leather goods	7,204	2,294	433
Lumber and its products	23,836	11,892	9,569
Oil, mineral	200,693	1,154,693	1,223,965
Paper and its products	31,406	3,120	7,063
Railway material	523,537	35,561	14,845
Stone, pottery, glassware and china	8,623	4,509	10,016
Textiles	104,710	12,990	6,468
Tobacco and its manufactures	93,076	6,123	11,842

FUTURE DEVELOPMENTS AS AN IMPORT MARKET

The primary need of Bahia Blanca is population, not only in the city itself but in the adjacent "camp." Until such time it must remain economically dependent upon Buenos Aires, and its import requirements will continue to be filled by the trading houses of that city.

The present position of the small farmer of south Argentina is, as a buyer, by no means satisfactory. State aid either in respect of seed or machinery is unknown as it is effected in Canada, and the farmer must depend wholly upon the result of his crops, against which the *consignatarios* or other exporting interests may choose to finance him as and at what rates they see fit. In respect of his purchases of seed or equipment no protective measures such as the Canadian "Farm Implements Acts" exist, and the Argentine farmer with no great capital at his disposal buys his machinery under very drastic legislation popularly known as the "Prenda Agraria"; this is a law by which the vendor or lender secures a prior lien on crops, cattle, and machinery upon which seizure may be made within forty-eight hours if the debt is not met at maturity. The chief disability of the system is that at present the *consignatarios* and importing houses operate independently, with a resultant confusion of interests in respect of security. The first market development then is likely to be the establishment of combined trading and consignment houses, which backed by adequate capital, would finance the wool and wheat exports and at the same time import the requirements of the agricultural community, to which the goods would be sold against the credits established by prospective production. No such organization exists at present.

But the fact remains that both by the logical expansion of its present position, and by the energetic efforts of the Government, the railways and the municipality, Bahia Blanca is on the threshold of becoming at no distant date a market of considerable importance. Its future is limited only by the future of Argentina itself. Buenos Aires is over-populated and over-congested, and the tendency is already towards decentralization. No country can long remain dependent on one city and one source of supply. Such a condition can only obtain during the earlier stages of development, and in prospect Bahia is inevitably the next centre to assume importance as a market. Those Canadian manufacturers who are concerned with the trade of South America will do well to watch attentively the trend of development in Bahia Blanca as the coming market of southern Argentina.

TARIFF CHANGES AND CUSTOMS REGULATIONS

Postponed Australian Customs Duties

C. Hartlett, Office of the Trade Commissioner

Melbourne, December 27, 1922.—The Commonwealth Minister of Trade and Customs has anounced that the operation of the deferred duties imposed on the undermentioned Tariff items has been postponed until the date specified opposite each item:—

	Tariff Item	Date
Item 136 (F)	Iron and steel hoop.	March 30, 1923
Item 147	Iron and steel, viz.—plates and sheets, plain tinned.	March 30, 1923
Item 152 (A)	Iron and steel tubes or pipes (except riveted, cast, close-jointed or cycle tubes or pipes) not more than 3 inches internal diameter; iron and steel boiler tubes.	March 30, 1923
Item 168 (B)	Sewing machines, treadle or hand, of the type ordinarily used in the household—(1) machine heads, whether imported separately or forming part of the complete machine, including accessories except wrenches and oil cans.	March 30, 1923
Item 181 (B)	(2) Cables, telegraph and telephone, paper insulated, lead covered.	March 30, 1923
Item 194 (D)	Chain, n.e.i. not made up into serviceable articles.	March 30, 1923
Item 197 (B)	Cutlery, spoons and forks n.e.i. and knife sharpeners.	March 30, 1923
Item 279 (A)	Citric acid.	March 30, 1923
Item 397 (A)	Cartridges, n.e.i.	July 1, 1923
Item 397 (D)	Powder, sporting; wads for cartridges, n.e.i.; caps, percussion; cartridges for military purposes; detonators; cartridge cases, empty, capped or uncapped; fuse cotton; mining fuses, electrical.	July 1, 1923
Item 358 (A)	Aeroplanes.	June 30, 1923.
Item 388	Metal cordage (excepting aluminium).	June 30, 1923.

DUTY ON WOOLEN YARN

It has been decided to give effect to the duty imposed in the tariff on woollen yarn as from January 1, 1923 (Item No. 392), as investigation by the Tariff Board indicated that Australian yarn manufacturers are now able to cope with requirements, especially in view of the fact that large importations of yarns have ben made in anticipation of the higher duty coming into operation. From the date mentioned the duty on woollen yarn will therefore be 10 per cent on British and 20 per cent on all other as against the hitherto free entry of British and 10 per cent on all other manufactures.

Revised Import Tariff of British Guiana

Trade Commissioner E. H. S. Flood

Barbados, January 11, 1923.—The new Customs Tariff Ordinance of British Guiana, which was published in the *Official Gazette* of that colony on December 23, 1922, is effective from December 4, 1922, to December 31, 1923.

The customs rates on imports under ad valorem show an advance from 10 per cent preferential and 20 per cent general to $16\frac{2}{3}$ per cent and $33\frac{1}{3}$ per cent respectively on all articles not particularly rated, and in addition, the 50 per cent surtax of the previous year was again imposed.

Under specific duties, changes appear in a few items in the tariff, as follows:—

	Tariff, 1922		Tariff, 1923	
Articles	Preferential	General	Preferential	General
Rice 100 lbs...	$0.25	$0.50	$0.50	$1.00
Milk, condensed, containing not less than 10 per cent butter fat, 48 lbs.	(On the free list)		Free	0.48
Milk, containing less than 10 per cent butter fat, 48 lbs.			$4.80	$9.60
Petrol, per gal.	$0.05	$0.10	0.10	0.20
Tobacco, cigars and cigarettes, per lb.	2.50	5.00	1.50	3.00
Other sorts, per lb.	1.75	3.50	1.20	2.40

The surtax of 25 per cent, in force last year, in addition to the duties shown in the specific schedule, is retained on all articles, except spirits and strong waters, tobacco and wines, on which the surtax is 15 per cent.

In the free list are now included cattle—bulls, cows and calves—imported for the purpose of stocking ranches in the interior of the colony, and materials used locally in the manufacture of soap and candles.

Customs Duty on Condensed Milk in British Guiana

Mr. E. H. S. Flood, Canadian Trade Commissioner in the British West Indies, reports under date January 6, 1923, that a customs duty has been imposed on condensed milk imported into British Guiana. Previously all milk of this kind, condensed and powdered, was admitted duty free. The attention of the Government was called to the fact that some of the milk imported into the colony was absolutely unsuited for feeding children, having but a small percentage of butter fat; and as a result of these representations, the Government passed a new ordinance continuing condensed milk, containing 10 per cent or over of butter fat, on the free list when of British origin, and when of foreign, duty at the rate of 48 cents per case. Milk, however, containing under ten per cent of butter fat requires to pay $4.80 per case when British, and $9.60 when foreign, plus the surtax on each rate.

Tax on Commercial Travellers in British Guiana

Mr. E. H. S. Flood, Canadian Trade Commissioner in the British West Indies, writes under date January 6, 1923, that a tax is now imposed on commercial travellers visiting the colony of British Guiana. They are now required to register at the office of the Chief Commissary and take out a license, for which the fee is $48, good for one year. The term "commercial traveller" includes any person who for himself or for another solicits orders and effects sales by samples.

United States Imposes Duty on Logs Cut from New Brunswick Crown Lands

Mr. M. M. Mahoney, representative at Washington of the Canadian Department of External Affairs, has forwarded copy of a notice sent under date of January 16 from the United States Treasury Department to Collectors of Customs, reading as follows:—

"The Secretary of State has caused to be forwarded to the Department a copy of the Act 1, George V., 1911, Chapter X, and Amendments, Province of New Brunswick, Schedule "A", of which contains the following provision:—

> '1. Every timber license or permit conferring authority to cut spruce or other soft wood, trees or timber, not being pine, suitable for manufacturing pulp or paper on the ungranted lands of the Crown shall contain and be subject to the condition that all such timber cut under the authority or permission of such license or permit, shall be manufactured in Canada, that is to say, into merchantable pulp and paper, or into sawn lumber, woodenware utensils or other articles of commerce or merchandise.'

"The Department is of the opinion that this provision constitutes a restriction upon the exportation of logs of fir, spruce, cedar, or Western hemlock, cut from the ungranted Crown lands in the Province of New Brunswick.

Collectors are, therefore, hereby instructed to assess duty under paragraph 401 of the Tariff Act of 1922, on such logs when imported from that province until otherwise advised.

"The Department is satisfied that at no time during the twelve months immediately preceding the taking effect of the Tariff Act of 1922, and at no time since then has the Province of New Brunswick maintained any embargo, prohibition or other restriction upon the exportation of logs of fir, spruce, cedar, or Western hemlock, cut from the private lands in that province. Collectors are, therefore, hereby instructed to admit such logs free of duty under the proviso of paragraph 401 of the Tariff Act of 1922, until otherwise advised.

"Collectors shall require the production of such evidence as shall satisfy them whether logs imported from New Brunswick were cut from ungranted Crown lands or from private lands, and shall submit to the Department for instructions any case in which they may be in doubt."

Section 401 of the United States tariff quoted above reads:—

"Logs of fir, spruce, cedar, or Western hemlock, $1 per thousand feet board measure: Provided, That any such class of logs cut from any particular class of lands shall be exempt from such duty if imported from any country, dependency, province, or other subdivision of government which has, at no time during the twelve months immediately preceding their importation into the United States, maintained any embargo, prohibition, or other restriction (whether by law, order, regulation, contractual relation or otherwise, directly or indirectly) upon the exportation of such class of logs from such country, dependency, province, or other subdivision of government, if cut from such class of lands."

Proposed Modification of the Argentine Import Tariff

Assistant Trade Commissioner P. W. Cook

Buenos Aires, January 4, 1923.—In his message to Congress delivered in December last, Dr. Alvear, President of the Republic, dealt at some length with the desirability of altering the Argentine tariff, pointing out the necessity for securing increased revenue. The present tariff became operative in 1905, since when it has never been subjected to any great change. The principle on which it is based is that of a fixed and arbitrary Government valuation of imports for the purpose of assesment, and it is now pointed out that the increases in commodity prices since 1905 have greatly reduced in effect the ad valorem revenue, in spite of additional surtaxes, etc., which have from time to time been imposed.

The President has asked Congress to authorize the appointment of a permanent Board of Appraisement to formulate a new tariff based on revised commodity values and to add to the existing 3,700 items some 1,500 commodities at present unlisted. As, however, this procedure would entail a great deal of time, and as the necessity for additional revenue is immediate, it was suggested to enact a temporary measure to become operative at once. The first proposal was that, pending the establishment of the new tariff, customs clearances should be effected on the basis of declared values vouched for on invoices signed by Argentine consuls, in a manner similar to that practised by the United States. On account of strong opposition from the Joint Committee of the Chambers of Commerce in Argentina of Great Britain, the United States, Spain, Belgium, Italy, France, and Holland, this idea is likely to be abandoned, and the plan of adding a further temporary surtax (probably 50 per cent) to

the present scale of fixed values has been suggested as a more desirable alternative. At the time of writing it seems probable that this latter plan will be adopted.

Of recent years changes in the Argentine tariff have been many times formulated, but have always failed to materialize. In the present instance, however, there seems good reason to believe that a radical increase is assured.

It is of interest to notice that the Joint Committee referred to above has petitioned the Minister of Finance to allow it to participate in the study of the final projected tariff amendment. It is probable that with certain reservations this request will be acceded to.

Canadian manufacturers will be at once advised when any definite change is effected. No deviation from the present non-preferential character of the tariff is in contemplation, and Canada will remain as heretofore on an equality with other countries.

Brazilian Duties to be Payable 60 per Cent in Gold

Major E. L. McColl, Canadian Government Trade Commissioner, Rio de Janeiro, Brazil, under date of January 8, writes: "I wish to advise that on and after March 31 customs duties will be collected at the rate of 60 per cent gold and 40 per cent paper. The present rate is 55 per cent and 45 per cent."

Italian Duty on Wheat Flour: A Correction

With reference to the announcement in *Commercial Intelligence Journal* No. 980, January 13, 1923, page 70, to the effect that the duty on wheat flour imported into Italy had ben reduced from 115 to 47 gold lire per metric ton, Trade Commissioner W. McL. Clarke has written that while 47 gold lire was the rate first quoted in an official statement in the Italian press, this has been corrected officially to read "40 gold lire per metric ton".

South African Customs Investigation Officer in United States

Mr. Frederic Hudd, Canadian Trade Commissioner in New York, under date of January 24, advises that the Government of the Union of South Africa has appointed Mr. James Moffatt as Special Customs Investigation Officer in the United States. Mr. Moffatt has arrived and may be addressed in care of the British Consulate General, 44 Whitehall street, New York City.

Customs Officials from New Zealand in United States

Under date of January 24, Mr. Frederic Hudd, Canadian Trade Commissioner in New York, writes that a New Zealand customs official has arrived in the United States and will open an office in New York in due course.

GOODS SENT TO CZECHO-SLOVAKIA BY POST

H.M. Minister at Prague reports that goods sent to Czecho-Slovakia by parcels post do not now require to be accompanied by import licenses at the time of despatch. In the case of parcels weighing not more than 1 kilogramme no import license is required by the addressee, but in the case of parcels exceeding that weight the addressee must, on arrival of the parcel in Czecho-Slovakia, obtain the license before he can obtain delivery of the parcel.

MAILS TO WEST INDIES, CENTRAL AND SOUTH AMERICA

The Post Office Department has furnished a table of sailings from which the following information for the guidance of Canadian firms writing to the above countries has been compiled:—

Correspondence for the West Indies is forwarded by direct Canadian steamers or via New York, whichever route will give a quicker despatch, although letters marked for transmission by either route are forwarded in accordance with the endorsation.

Letters for Central America are forwarded via New York, with the exception of letters for British Honduras specially addressed "Via Halifax."

Letters for South American countries generally are also forwarded via New York, unless specially addressed "Via Halifax."

Following are sailings for the balance of the month of February:—

For	*Via*	*February*
Antigua	New York	13, 15, 17.
Argentina	New York	10, 15, 17, 24.
Bahamas	New York	2, 8, 9, 16, 23.
Barbados	New York	15, 17.
Bermuda	New York	7, 10, 14, 17, 24.
Bolivia and Chile	New York	5, 8, 15, 21, 22, 24, and every Wednesday.
Brazil, North	New York	10, 15, 17, 20, 25.
Brazil, South	New York	10, 15, 17, 20, 25.
British Guiana	New York	6, 15, 17, 24.
Colombia	New York	5, 8, 9, 15, 21, 22, 23, 24, and every Wednesday.
Costa Rica	New York	Every Saturday.
Curacao	New York	10, 17, 24.
Dominica	New York	10, 14, 17, 24, 28.
Dutch Guiana	New York	6, 15, 17, 24.
French Guiana	New York	6, 15, 17, 24.
Haiti	New York	5, 9, 15, 16, 20, 23, 24.
Jamaica	New York	10, 16, 24, and every Wednesday and Saturday.
Martinique	New York	15, 17.
Nicaragua	New York	Every Wednesday.
Panama and Canal Zone	New York	5, 8, 15, 21, 22, 24, and every Wednesday.
Paraguay	New York	15, 17, 24.
Peru	New York	5, 8, 15, 21, 22, 24, and every Wednesday.
Porto Rico	New York	Every Saturday.
Salvador	New York	5, 8, 15, 22, 24, and every Wednesday.
St. Kitts-Nevis	New York	15, 17.
Trinidad	New York	6, 7, 15, 28.
Turk's Island and Dominican Republic	New York	10, 14, 16, 24, 28.
Uruguay	New York	10, 15, 17, 24.
Venezuela	New York	8, 10, 15, 17, 23, 24.

Canadian Manufacturers and Exporters are strongly advised to file all numbers of the "Commercial Intelligence Journal" for future reference, and to bind them with the Index at the end of each half year.

TENDERS INVITED

Australia

Copies of tender forms and specifications have been received from Mr. D. H. Ross, Canadian Trade Commissioner, Melbourne, for equipment and material required by the Victorian Railway Department, Melbourne; the Commonwealth Postmaster General's Department, Melbourne; and the Metropolitan Water Supply and Sewerage Board, Brisbane, Australia.

These tender forms and specifications are open to the inspection of interested Canadian manufacturers at the Department of Trade and Commerce, Ottawa (refer to file Nos. 17290, 26502).

Tenders in conformity to the specifications should be addressed, respectively, to the Secretary, Victorian Government Railways, Melbourne, Australia; the Deputy Postmaster General, Melbourne, Australia; and the Secretary, Metropolitan Water Supply and Sewerage Board, Brisbane, Australia.

Particulars of the requirements are briefly outlined thus:—

VICTORIAN GOVERNMENT RAILWAYS

No.	Date of closing	Particulars
[illegible]	Mar. 7, 1923	Supply and delivery of one Combination Turret Lathe and one set of Tool Equipment for same, as specified.
35772	Mar. 28, 1923	Supply and delivery of two sets of Three-phase Alternating-Current Induction Motors, complete with starting apparatus and accessories, as specified.
35773	Mar. 28, 1923	Supply and delivery of one set of 20 Brake Horse-Power 440-Volt Continuous-Current Compound Motor, starting apparatus and accessories, as specified.
357[illegible]3	[illegible] 1923	Supply and delivery of one Electric Hoist, as specified.

POSTMASTER GENERAL'S DEPARTMENT

V. 110	Feb. 20, 1923	Supply and delivery of 39½ tons of Sulphate of Copper.
V. 111	Feb. 20, 1923	Supply and delivery of 9 tons of Ammonium Chloride, as specified.
Vic. 102	Apr. 10, 1923	Supply and delivery of approximately 1,900 tons of hard and soft drawn copper wire, as specified.
104	Apr. 17, 1923	Supply and delivery of approximately 1,460 miles of covered wires, as specified.

METROPOLITAN WATER SUPPLY AND SEWERAGE BOARD, BRISBANE

34 22	June 26, 1923	Supply, delivery, erection and setting to work of additional pumping plant complete with all accessories at Mt. Crosby pumping station, near Brisbane, Queensland.

New Zealand

Copies of specifications have been received from Mr. W. A. Beddoe, Canadian Trade Commissioner, Auckland, for equipment for the Public Works Tenders Board, Wellington. These specifications are open for inspection at the Commercial Intelligence Branch of the Trade and Commerce Department, Ottawa (quote file No. 28494). Tenders should be addressed to the Secretary, Public Works Supplies and Tenders Committee, Wellington, in accordance with these specifications.

No.	Date of closing	Particulars
S.M. 156	March 6, 1923.	*Mangahao Power Scheme*—Section 72—260 miles of aluminium steel conductors, which shall comply with the following details with a tolerance of 2 per cent: overall diameter, 0.501 in.; maximum resistance per mile at 60° F., 0.55 ohm.; weight per mile, 1,227 lbs.; breaking strength in tension, 6,660 lbs.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING JANUARY 30, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement on the nominal closing quotations for all the principal exchanges for the week ending January 30, 1923. Those for the week ending January 23 are also given for the sake of comparison.

		Parity	Week ending Jan. 23, 1923.	Week ending Jan. 30, 1923.
Britain .. ..£	1.00	$4.86	$4.7038	$4.6886
France .. ..Fr.	1.	.193	.0658	.0611
Italy .. ..Lire	1.	.193	.0482	.0480
Holland .. ..Florin	1.	.402	.3994	.3984
Belgium .. ..Fr.	1.	.193	.0585	.0543
Spain.. .. .. Pes.	1.	.193	.1580	.1574
Portugal .. ..Esc.	1.	1.08	.0479	.0480
Switzerland.. .. .. Fr.	1.	.193	.1883	.1886
Germany .. .. Mk.	1.	.238	.000052	.000022
Greece .. .. Dr.	1.	.193	.0131	.0131
Norway .. .. Kr.	1.	.268	.1885	.1884
Sweden .. ..Kr.	1.	.268	.2713	.2705
Denmark .. .. Kr.	1.	.268	.1969	.1936
Japan .. ..Yen	1.	.498	.4934	.4888
India .. .. R.	1.	2s.	.3341	.3309
United States .. ..$	1.	$1.00	1.0096	1.0106
Mexico .. ..$	1.	.498	.4967	.4964
Argentina .. ..Pes.	1.	.424	.3761	.3739
Brazil .. .. Mil.	1.	.324	.1161	.1157
Roumania .. .. Lei	1.	.198	....	....
Jamaica .. ..£	1.	4.86	4.7150	4.6943
British Guiana .. ..$	1.	1.	.9838-.9863	.9796-.9822
Barbados .. ..$	1.	1.		
Trinidad .. ..$	1.	1.		
Dominica.. .. ..$	1.	1.		
Grenada .. ..$	1.	1.		
St. Kitts .. ..$	1.	1.		
St. Lucia.. .. ..$	1.	1.		
St. Vincent .. ..$	1.	1.		
Tobago .. ..$	1.	1.		
Shanghai, China .. ..Tael	1.	.708	.7408	.7364
Batavia, Java .. .. Guilder	1.	.402	.3937	.3941
Singapore, Straits Settlements .. $	1.	.567	.5553	.5558

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1185. Flour, Oats, Oilmeal.—A firm of manufacturers' agents and commission merchants in Barbados in good standing desire to obtain a connection for flour, oats, and oilmeal.

1186. Oats and Oilmeal.—A commission firm of some years' standing in Georgetown, Demerara, British Guiana, would like to get in touch with a Canadian exporter of oats and oilmeal who is not at present represented in Demerara, preferably a Montreal firm.

1187. Wheat.—A Genoa firm importing wheat wishes to receive offers from Canadian shippers.

1188. Wheat.—An Italian firm desires to get in touch with leading Canadian producers of wheat.

1189. Wheat.—A firm in Florence inquires for Canadian wheat.

1190. Wheat and Oats.—An Italian firm would like to be put in touch with Canadian exporters of wheat.

1191. Wheat, Barley, Rye, and Oilseeds.—A house of commission agents at Genoa is anxious to receive offers from Canadian exporters.

1192. Wheat.—A firm in Milan would be glad to hear from Canadian exporters of wheat.

1193. Wheat, Rye, and Oats.—A firm in Genoa is desirous to secure wheat, rye, and oats from Canada.

1194. Wheat, Barley, and Fodder.—A Genoa company is prepared to receive offers from Canadian shippers of wheat, barley, and fodder.

1195. Canned Tomatoes.—A London merchant asks for names of Canadian packers of canned tomatoes seeking business in Great Britain.

1196. Canned Salmon, Crabs, and Crayfish.—A merchant house in Nantes seek the representation of Canadian packers of canned salmon, crabs, and crayfish, seeking business in France.

1197. Packing House Products.—A firm of commission merchants in Barbados would like to secure the agency for packing house products, including a full range of pickled goods and, if possible, oleomargarine.

1198. Canned and Salted Salmon.—A commission agent in Barbados, in good standing, wishes to obtain a Canadian connection for canned and salted salmon.

Miscellaneous

1199. Hardware, Wires, Machinery, etc.—A Dutch firm are desirous of importing hardware, wires of all kinds, agricultural machinery, laundry machinery, tools.

1200. Agricultural Implements and Hardware.—A manufacturers' representative in Port-au-Prince, Haiti, would like to get in touch with Canadian exporters of agricultural implements, also hardware—including pipings, etc.—and cutlery—forks, spoons, and knives.

1201. Chairs.—A manufacturers' agent in Barbados would like to obtain a Canadian agency for cheap chairs, including upright, in caned and wooden bottoms, and also cane-seated rockers.

1202. Chairs and Rockers.—A commercial agent of long standing with head office in Bridgetown, Barbados, desires to obtain an agency for chairs and rockers, the former with both cane and wooden seats.

1203. Leather.—A Swedish concern desires to get into touch with Canadian manufacturers of patent kid and patent sides.

1204. Paper and Paper Bags.—A manufacturers' agent in Barbados desires a Canadian agency for wrapping paper in rolls and also paper bags.

1205. Printing, News, and Writing Paper, etc.—A firm in Melbourne would like to hear from Canadian exporters of paper, printing, news, writing, wrapping, and other coated papers, boards, kraft, etc.; also a lead pencil of Canadian manufacture, similar to the "Pals" Eversharp pencil of United States manufacture.

1206. Wheat, Metals, and Coal.—A company in Genoa, with branch office in Milan and Venice, carrying on business in wheat, metals, and coal, would be glad to do business with Canada.

1207. Railway and Tramway Material.—A firm in Melbourne would like to represent Canadian exporters of railway and tramway material of all kinds; electrical supplies for Government telephone and telegraph departments such as cables, telephones and accessories; excavating plant, steam shovels, wagons, etc., for quarrying and other purposes.

1208. Porcelain Insulators.—A firm in Melbourne would like to represent Canadian exporters of porcelain insulators of the following volts: 2,300, 5,000, 10,000, 20,000, 33,000; and low tension insulators of 440 volts.

1209. Colours in Tubes for Painters, Varnishes, and Boiled Oil.—A Milan firm are anxious to deal with Canadian shippers.

1210. Straw Brooms.—A long-established commission agent in Barbados desires to have a Canadian connection for straw brooms.

1211. Cigarette Machines.—A trader in Barbados who has been doing business for about fifteen years would like to get in touch with cigarette-making machine manufacturers with the object of purchasing a machine for cash.

1212. Light Automobiles.—A manufacturers' representative in Port-au-Prince, Haiti, would like to obtain an agency for a light and cheap make of automobile which could be exported for about $800 f.o.b. Canadian port.

1213. Pulp Board Suitable for Making Milk Bottle Discs.—A London firm who are about to commence the manufacture of cardboard discs for milk bottles would be glad to hear, either direct of through their Canadian agents, from Canadian manufacturers of pulp board able to supply this in 5- to 10-ton lots. Reels not to be more than 30 cm. wide.

1214. Paper Cartons.—A firm in Kingston, Jamaica, would like to hear from Canadian exporters of paper cartons. Sample on file at Department of Trade and Commerce, Ottawa.

1215. Spruce.—A London company who have an inquiry from Australia for Canadian spruce suitable for making up into packing cases invite offers from Canadian suppliers.

1216. Boots and Shoes, Agricultural Implements, etc.—A London firm of indent merchants, who purchase upon behalf of branches and customers in South Africa and Australia, are prepared to consider Canadian offers of boots and shoes, agricultural implements, chemicals (heavy), clothing, furniture, glassware, hardware, iron and steel, kitchenware, paper and textiles, when required.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From St. John

To London.—Canadian Leader, Canadian Government Merchant Marine, Ltd., Feb. 7; Holbrook, Canadian Pacific Steamships, Ltd., Feb. 10; Brant County, I.C. Transports, Ltd., Feb. 15; Batsford, Canadian Pacific Steamships, Ltd., Feb. 20; Canadian Victor, Canadian Government Merchant Marine, Ltd., Feb. 21; Rapidan, Furness Line, Feb. 27.

To Manchester (via Halifax).—Manchester Producer, Manchester Line, Feb. 15; Manchester Regiment, Manchester Line, Feb. 24.

To Liverpool.—Montcalm, Canadian Pacific Steamships, Ltd., Feb. 9; Marburn, Canadian Pacific Steamships, Ltd., Feb. 16; Canadian Miller, Canadian Government Merchant Marine, Ltd., Feb. 20; Montclare, Canadian Pacific Steamships, Ltd., Feb. 23.

To Glasgow.—Methven, Canadian Pacific Steamships, Ltd., Feb. 10; Gracia, Cunard-Anchor-Donaldson Line, Feb. 10; Canadian Voyageur, Canadian Government Merchant Marine, Ltd., Feb. 15; Marburn, Canadian Pacific Steamships, Ltd., Feb. 16 (via Liverpool); Concordia, Anchor-Donaldson Line, Feb. 22; Canadian Squatter, Canadian Government Merchant Marine, Ltd., Feb. 28; Cabotia, Cunard-Anchor-Donaldson Line, Feb. 28; Metagama, Canadian Pacific Steamships, Ltd., March 1.

To Cardiff and Swansea.—Canadian Runner, Canadian Government Merchant Marine, Ltd., Feb. 14; Canadian Navigator, Canadian Government Merchant Marine, Ltd., Feb. 28.

To Hull (via Halifax).—Lexington, Furness Line, Feb. 6; Ariano, Furness Line, Feb. 23.

To Southampton, and Hamburg.—Melita, Canadian Pacific Steamships, Ltd., Feb. 10.

To Belfast.—Melmore Head, Head Line, Feb. 25.

To Dublin.—Melmore Head, Head Line, Feb. 25.

To Avonmouth.—Methven, Canadian Pacific Steamships, Ltd., Feb. 10; Concordia, Cunard-Anchor-Donaldson Line, Feb. 22; Cabotia, Cunard-Anchor-Donaldson Line, Feb. 28.

To Antwerp.—Batsford, Canadian Pacific Steamships, Ltd., Feb. 20.

To Rotterdam and London.—Brant County, I.C. Transports, Ltd., Feb. 15.

To Rotterdam and Hamburg.—Dunaff Head, Head Line, Feb. 11.

To Bermuda, Barbados, Trinidad and Demerara.—Montezuma, Canadian Pacific Steamships, Ltd., Feb. 17.

To Havre and Hamburg.—Melita, Canadian Pacific Steamships, Ltd., Feb. 10; Hastings County, I.C. Transports, Ltd., Feb. 18; Hoerda, I.C. Transports, Ltd., March 3.

To Australia and New Zealand.—Erroll, New Zealand Shipping Co., Feb. 21.

To South Africa.—New Mexico, Elder, Dempster & Co., Feb. 25.

To Rio de Janeiro, Santos, Montevideo and Buenos Aires.—A steamer, Houston Line, Feb. 20.

From Halifax

To Liverpool.—Andania, Cunard-Anchor-Donaldson Line, Feb. 12; Canada, White Star-Dominion Line, Feb. 25; Ausonia, Cunard-Anchor-Donaldson Line, Feb. 26.

To Londonderry and Glasgow.—Saturnia, Cunard-Anchor-Donaldson Line, Feb. 25.

To Plymouth, Cherbourg, and London.—Antonia, Cunard-Anchor-Donaldson Line, March 9.

To Bermuda, Barbados, Trinidad and Demerara.—Royal Mail Steam Packet Co.'s ships, Feb. 2, and every fortnight thereafter.

To Barbados, Trinidad, and Demerara.—Canadian Logger, Canadian Government Merchant Marine, Feb. 10.

To Santiago (Cuba), Kingston, Montego Bay and St. Ann's Bay (Jamaica).—Andalusia, Pickford & Black, Feb. 28.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—Canadian Forester, Canadian Government Merchant Marine, Feb. 8

To Guantanamo, Santiago (Cuba), and Kingston, (Jamaica).—Ottar, Pickford & Black, Feb. 14.

To Australia and New Zealand.—Canadian Seigneur, Canadian Government Merchant Marine, Ltd., Feb. 20.

From North Sydney

To St. John's (Nfld.).—Kyle, Reid-Newfoundland Co., Tuesday, Thursday and Saturday every week; Sable I., Farquhar Steamship Co., every Saturday.

From Vancouver

To Honolulu, Suva, Auckland, and Sydney.—Makura, Canadian-Australasian Royal Mail Line, Feb. 23.

To Yokohama, Kobe, Nagasaki, Shanghai, Manila and Hong Kong.—Empress of Asia, Canadian Pacific Steamships, Ltd., Feb. 22.

To Yokohama, Kobe, Shanghai and Hong Kong.—Arabia Maru, Osaka, Shosen Kaisha, Feb. 17

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Yokohama Maru, Nippon Yusen Kaisha, Feb. 28.

To Yokohama and Kobe.—Tokiwa Maru, Nippon Yusen Kaisha, Feb. 20.

To Yokohama, Kobe, Manila and Hong Kong.—Tyndareus, Blue Funnel Line, Feb. 17.

To Australasian Ports.—Canadian Transporter, Canadian Government Merchant Marine, Feb. 6.

To Auckland, Melbourne and Sydney.—Hauraki, Canadian-Australasian Royal Mail Line, Feb. 10.

To the Orient.—Canadian Prospector, Canadian Government Merchant Marine, Feb. 12.

To London and Liverpool.—Dramatist, Harrison Direct Line, late February.

To Wellington, Melbourne and Sydney.—Waiotapu, Canadian-Australasian Royal Mail Line, about Feb. 10.

To Yokohama, Kobe, Moji, Darien, Shanghai and Hong Kong.—Arabia Maru, Osaka Shosen Kaisha, Feb. 14; Arizona Maru, Osaka Shosen Kaisha, Feb. 18.

To Yokohama, Kobe, Moji, Shanghai and Manila.—Manila Maru, Osaka Shosen Kaisha, Feb. 27.

To Mexico, Central America, Colombia and Ecuador.—Sinaloa, Latin-America Line, Feb. 6.

To London, Hull, Hamburg and Copenhagen.—Peru, East Asiatic Co., early February; Siam, East Asiatic Co., Inc., late February.

NATIVE-USED TOOLS IN BRITISH EAST AFRICA

Such tools as axes, hoes, mattocks, machetes, picks, and cane knives have a wide sale in East Africa, says the United States *Commerce Reports*. The native does all his farming with hoes and machetes. During 1921 the value of agricultural implements and small tools imported was £205,937, and 68 per cent of this amount represents the sum expended for small tools. Of the total, 27 per cent came from the United States. An increase in the demand for machetes and cane knives may be expected in consequence of the recent boom in the production of sugar cane.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 248 St. James street, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic.

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address, Canadian.*

Australia.

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium.

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil.

Major E. L. McColl. Address for letters—Caixa (P.O. Box) 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies.

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China.

J. W. Ross, Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba.

Address: 400 and 401 Teniente Rey 11, Havana. (Post-office Box 1290.) *Cable Address, Cantracom.*

France.

Lieut-Col. Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany.

L. D. Wilgress, Care British Consulate-General, Hamburg. (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland.

Norman D. Johnston, Zuidblaak 26, Rotterdam. *Cable Address, Watermill.*

India and Ceylon.

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy.

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica.

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan.

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico.

C. Noel Wilde. Address for letters, Apartado Num. 26, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian*

New Zealand.

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa.

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements.

P. W. Ward, P.O. Box 121, Singapore. (Territory covers Straits Settlements, British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

A. B. Muddiman, Sun Building, Clare Street, Bristol. *Cable Address, Canadian.*

Major Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States.

Frederic Hudd, 44 Whitehall Street, New York City. *Cable Address, Cantracom.*

CANADIAN COMMERCIAL AGENTS

Australia.

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark.

C. E. Sontum, Grubbegd, No. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies.

R. H. Curry, Nassau, Bahamas.

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

Vol. XXVIII February 10, 1923 No. 993

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
Hon. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

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TABLE OF CONTENTS

Commercial Intelligence Journal

Issued Every Saturday by the Department of Trade and Commerce

Ottawa **Saturday, February 10, 1923** **No. 993**

CONVENTION OF COMMERCE BETWEEN CANADA AND FRANCE, 1922*

GEORGE, R.I.

GEORGE, *by the Grace of God, of the United Kingdom of Great Britain and Ireland and of the British Dominions beyond the Seas, King, Defender of the Faith, Emperor of India, etc., etc., etc.*

To all and singular to whom these Presents shall come, Greeting!

WHEREAS, for the better treating of and arranging certain matters which are now in discussion, or which may come into discussion, between Us and Our Good Friend the President of the French Republic respecting commercial relations between France and Canada, We have judged it expedient to invest fit persons with Full Power to conduct the said discussion on Our part: Know ye, therefore, that We, reposing especial Trust and Confidence in the Wisdom, Loyalty, Diligence and Circumspection of Our Trusty and Well-beloved the Honourable William Stevens Fielding, Member of the Parliament of Canada, Member of Our Privy Council for Canada, Minister of Finance of Our Dominion of Canada; and Our Trusty and Well-beloved the Honourable Ernest Lapointe, One of Our Counsel learned in the Law, Member of the Parliament of Canada, Member of Our Privy Council for Canada, Minister of Marine and Fisheries of Our Dominion of Canada, have named, made, constituted and appointed, as We do by these Presents name, make, constitute and appoint them Our undoubted Commissioners' Procurators and Plenipotentiaries; Giving to them all manner of Power and Authority to treat, adjust and conclude with such Minister or Ministers as may be vested with similar Power and Authority on the part of Our Good Friend the President of the French Republic any Treaty, Convention or Agreement that may tend to the attainment of the above-mentioned end, and to sign for Us, and in Our name, everything so agreed upon and concluded and to do and transact all such other matters as may appertain thereto, in as ample manner and form, and with equal force and efficacy, as We Ourselves could do, if personally present: Engaging and promising, upon Our Royal Word, that whatever things shall be so transacted and concluded by Our said Commissioners,

* [Tabled in the House of Commons by the Hon. W. S. Fielding on February 5, 1923.]

Procurators and Plenipotentiaries, shall, subject if necessary to Our Ratification, be agreed to, acknowledged and accepted by Us in the fullest manner, and that We will never suffer, either in the whole or in part, any person whatsoever to infringe the same, or act contrary thereto, as far as it lies in Our Power.

In witness whereof We have caused the Great Seal of Our United Kingdom of Great Britain and Ireland to be affixed to these Presents, which We have signed with Our Royal Hand.

Given at Our Court of St. James, the Fifteenth day of November in the Year of our Lord, One Thousand Nine Hundred and Twenty-two and in the Thirteenth Year of Our Reign.

CONVENTION OF COMMERCE

BETWEEN

CANADA AND FRANCE

HIS MAJESTY THE KING *of the United Kingdom of Great Britain and Ireland and of the British Dominions Beyond the Seas, Emperor of India,* and THE PRESIDENT OF THE FRENCH REPUBLIC, being desirous of improving and extending the commercial relations between Canada and France, have resolved to conclude a Convention and have named as their respective Plenipotentiaries, that is to say:

HIS MAJESTY THE KING *of the United Kingdom of Great Britain and Ireland and of the British Dominions Beyond the Seas, Emperor of India:*

His Excellency the Right Honourable Baron HARDINGE *of* PENSHURST, Knight of the Most Noble Order of the Garter, Knight Grand Cross of the Most Noble Order of the Bath, Knight Grand Commander of the Most Exalted Order of the Star of India, Knight Grand Cross of the Most Distinguished Order of St. Michael and St. George, Knight Grand Commander of the Most Eminent Order of the Indian Empire, Knight Grand Cross of the Royal Victorian Order, Companion of the Imperial Service Order, His Majesty's Ambassador Extraordinary and Plenipotentiary to the French Republic;

The Honourable WILLIAM STEVENS FIELDING, a Member of His Majesty's Honourable Privy Council for Canada, a Member of the Parliament of Canada, Minister of Finance and Receiver General of Canada;

The Honourable ERNEST LAPOINTE, a Member of His Majesty's Honourable Privy Council for Canada, a Member of the Parliament of Canada, Minister of Marine and Fisheries of Canada;

And THE PRESIDENT OF THE FRENCH REPUBLIC:

M. RAYMOND POINCARÉ, Senator, President of Council, Minister of Foreign Affairs;

M. LUCIEN DIOR, Member of the Chamber of Deputies, Minister of Commerce;

Who, after communicating to each other their respective full powers, found in good and due form, have agreed upon the following articles:

ARTICLE I

The natural and manufactured products originating in and coming from Canada enumerated in Schedule A to this Convention shall enjoy when imported into France, the French Colonies, Possessions and Protectorates having

the same customs tariff as France the benefit of the minimum tariff and of the lowest rates of duties as regards present import duties and taxes and as regards any such duties or taxes which France may hereafter establish and also as regards surtaxes, co-efficients or other temporary increases that France may establish.

ART. II

The grant of the minimum tariff for the products enumerated in Schedule A means the treatment of the Most Favoured Nation as respects such products, but does not entitle Canada to claim the benefit of any preferential advantage which France may grant to her Protectorates or the benefit of any tariff resulting from economic agreements which France may enter into with border states, or the benefits of any tariff which France may grant for products the importation of which is designed to facilitate financial settlements with those countries that were at war with France during the years 1914-1918.

ART. III

The natural and manufactured products originating in and coming from Canada enumerated in Schedule B to this Convention when imported into France, the French Colonies, Possessions and Protectorates having the same customs tariff as France shall enjoy the benefit of the percentages of reduction mentioned in the said Schedule, such percentages to bear on the difference between the rates of the general tariff and those of the minimum tariff. These percentages shall remain the same whatever increase or decrease of tariff duties, surtaxes or co-efficients France may establish in the future.

ART. IV.

If France shall at any time grant to the United States of America as regards any of the products mentioned in Schedule B to the present Convention percentages more favourable than those mentioned in the said Schedule, or the benefit of the minimum tariff the same or similar products originating in and coming from Canada shall immediately and unconditionally enjoy the benefit of the said concessions.

ART. V.

All products originating in and coming from Canada other than those mentioned in Schedules A and B to this Convention shall be subject in France to the rates of the general tariff of 1910 as long as by virtue of the French decree of March 28th, 1921, such tariff shall continue to be applicable to the products of the United States of America other than those specified in Schedule A and Schedule B to the French law of March 29th, 1910.

If the United States of America should at any time cease to enjoy the benefit of the French decree of March 28th, 1921, products of Canada other than those enumerated in Schedules A and B to this Convention shall enjoy a reduction of twenty-five per cent on the difference between the French general tariff and minimum tariff, whatever the rates of these tariffs may be.

If at any time France grants to the United States of America for any products other than those enumerated in Schedules A and B to this Convention

more favourable treatment than is granted to Canada, Canada shall be entitled to claim the benefit of the same treatment for any identical or similar products originating in and coming from Canada, on condition that France shall be entitled to ask from Canada a reasonable and equivalent concession. France undertakes to give due consideration to any claim thus put forward by Canada and promptly to make known what concession of a similar nature she wishes to receive in return. The Governments of the two countries undertake to examine these questions in a friendly spirit and with a mutual desire to arrive at an equitable agreement.

Art. VI.

The natural and manufactured products originating in and coming from Canada shall enjoy in the French Colonies, Possessions and Protectorates not having the same customs tariff as France the benefit of the tariff which may be applied there to the products of the Most Favoured Foreign Nation.

If the regime appointed to the most favoured foreign nation does not grant in the islands of St. Pierre and Miquelon the benefit of the minimum tariff for any of the products mentioned in Schedule C the lowest tariff in force in these islands shall nevertheless apply to the said products originating in and coming from Canada.

Art. VII.

If under the preceding Articles the French minimum tariff does not apply to foodstuffs originating in and coming from Canada these products shall nevertheless enjoy the benefit of the said tariff upon their importation into the French West Indies and French Guiana.

Art. VIII.

The natural and manufactured products originating in and coming from France and from the French Colonies, Possessions and Protectorates shall be admitted into Canada under the rates of the intermediate tariff or of any more favourable tariff that Canada may grant to the products of any other foreign country.

Art. IX.

The natural and manufactured products originating in and coming from France, the French Colonies, Possessions and Protectorates, enumerated in Schedule D to this Convention shall enjoy on their importation into Canada the benefit of the rates mentioned in the said Schedule as well as any more favourable tariff that Canada may grant to the identical or similar products of any foreign country.

Art. X.

The natural and manufactured products originating in and coming from France, the French Colonies, Possessions and Protectorates, enumerated in Schedule E to this Convention when imported into Canada shall be subject to the duties of the intermediate tariff, provided, however, that on the amount of the duty computed under such tariff the importer shall be entitled to a discount of ten per cent.

Provided also that on such products or any of them the proportionate difference between the intermediate and general tariffs shall at no time be less than it is at present.

ART. XI.

The natural and manufactured products originating in and coming from France, the French Colonies, Possessions and Protectorates enumerated in Schedule F to this Convention when imported into Canada shall be subject to the duties of the intermediate tariff, provided, however, that on the amount of the duty computed under such tariff the importer shall be entitled to a discount of fifteen per cent.

Provided also that, on such products or any of them, the proportionate difference between the intermediate and general tariffs shall at no time be less than it is at present.

ART. XII.

For the products mentioned in the Schedules to this Convention Canada and France grant to each other the benefit of the most favourable rates that may result from changes introduced into the classification of goods or from specializations introduced into the tariffs as a result of administrative or legislative measures or as a result of conventions entered into with other Powers.

ART. XIII.

Subject to the exceptions provided for in Article II of the present Convention any product at present admitted free of customs duties into France, the French Colonies, Possessions and Protectorates if later made subject to a customs duty shall enjoy if originating in and coming from Canada the lowest tariff which applies to a similar product imported from any foreign country whatsoever.

Reciprocally if any product at present admitted free of customs duties into Canada by virtue of the Canadian intermediate tariff or of any tariff that may be substituted for it becomes liable to a customs duty the said product when imported from France or the French Colonies, Possessions and Protectorates shall enjoy the lowest tariff which applies to a similar product imported from any foreign country whatsoever.

ART. XIV.

To enjoy the benefit of the tariff advantages provided for in the foregoing Articles products originating in and coming from France, the French Colonies, Possessions and Protectorates shall be conveyed without transhipment from a port of those territories or from a port of a country enjoying the benefit of the preferential or intermediate tariff into a sea or river port of Canada.

Reciprocally to enjoy the benefit of the tariff advantages provided for in the foregoing Articles the products originating in and coming from Canada imported into France, the French Colonies, Possessions and Protectorates shall be conveyed direct from a Canadian port without transhipment in any country that does not enjoy the said tariff advantages.

Provided, however, that nothing in this Article shall exempt the product of either country from any surtaxe d'entrepôt that is now or hereafter may be imposed on products imported indirectly.

Art. XV

France and Canada undertake not to establish one against the other any prohibition or restriction of importation, exportation, or transit which shall not at the same time be applicable to other countries.

Provided, however, that France and Canada reserve to themselves the right to establish in regard to products originating in or destined for the one or other country any temporary prohibition or restriction of importation, exportation, or transit which either of them adjudges necessary to protect the public health, to prevent the spread of animal diseases or the destruction of crops, or in the interest of national safety.

Art. XVI

The High Contracting Parties grant to each other as regards export duties and taxes the most favoured nation treatment. Drawbacks on the exportation of French or Canadian products shall not be higher than the amount of the import, excise, interior consumption or town duties collected upon the said products or the materials entering into their manufacture.

Art. XVII

The natural and manufactured products of the two countries imported into the territory of the other and destined for warehousing or transit to any destination whatsoever shall not be liable to any tariff duty or interior duty other than those at present in force in either of the two countries or any other duties and impositions intended specifically to defray the cost of supervision or administrative expenses which may arise from the transit, not excluding, however, fiscal taxes incident to the transactions which these goods may be subject to in the course of warehousing or transportation.

Art. XVIII

Products of Canadian origin of any kind imported into France, the French Colonies, Possessions and Protectorates shall not be subject to any other or higher duties of excise or town dues than those which are or may be charged upon like products of the most favoured nation.

In like manner products of any kind originating in France, the French Colonies, Possessions or Protectorates when imported into Canada shall not be subject to any other or higher duties of excise or town dues than those which are or may be charged upon like products of the most favoured nation.

France and Canada guarantee to one another the treatment of the Most Favoured Nation as regards the duties of exportation, re-exportation, transit, warehousing, the transhipment of goods and the fulfilment of customs formalities.

Subject to the laws now in force in either country France and Canada grant each other national treatment as regards consumption dues or other duties imposed upon the sale of goods.

Art. XIX

For the enforcement of the foregoing Articles France and Canada may require the products to be accompanied upon their importation by certificates of origin or declarations issued in conformity with the laws of the country from which they originate.

If the Canadian Government or the French Government deem it necessary to have such certificates or declarations vised they may appoint or designate for such purposes officers who shall give such visés free of charge.

If in any case representations be made to one of the Governments by an authorized agent of the other Government that there is reason to believe that fraudulent practices have been resorted to in the issue of such certificates the Government to which the complaint is made shall immediately take steps to inquire into the facts of the case, shall report the result of the inquiry to the complaining Government and shall take all available means to prevent the continuation of the fraudulent practices if such be found.

Art. XX

If importers of French wines or other products of French agriculture furnish certificates of analysis or of purity thereof issued by scientific establishments under the control of the Minister of Agriculture of France and designated by him, such certificates shall for all purposes be taken into consideration by the Canadian Customs authorities, without, however, restricting their right of appraisement.

In like manner certificates accompanying Canadian products issued by any authority under the control of the Government of Canada shall for all purposes be taken into consideration by the French Customs authorities without, however, restricting their right of appraisement.

To enjoy the benefit of the tariff advantages granted by this Convention, every invoice of champagne, cognac brandy, and armagnac brandy shall be accompanied by a certificate of analysis and purity issued under the authority of the Government of the country of production.

Art. XXI

France and Canada grant to each other reciprocally the treatment of nationals as respects the protection of trade-marks, patents, commercial names, industrial designs and patterns, names of origin of products and the prevention of unfair competition.

Art. XXII

For the application of *ad valorem* duties, exporters of products originating in France, the French Colonies, Possessions and Protectorates, and reciprocally the exporters of Canadian products, may produce certificates of value issued by any Chamber of Commerce or by any other similar commercial organization. Such certificates shall be taken into consideration by the respective Customs officials, in levying the duties to which the imported products may be liable, without, however, restricting their right of appraisement.

Art. XXIII

Merchants and manufacturers, subjects of one of the High Contracting Parties, as well as merchants and manufacturers domiciled and exercising their commerce and industries in the territories of such party, may, in the territories of the other, either personally or by means of commercial travellers make purchases or collect orders, with or without samples, and such merchants, manufacturers and their commercial travellers, while so making purchases or collecting orders shall in the matter of taxation and facilities enjoy the most-favoured-nation treatment.

Articles imported as samples for the purposes above mentioned shall, in each country, be temporarily admitted free of duty on compliance with the

customs regulations and formalities established to assure their re-exportation or the payment of the prescribed customs duties if not re-exported within the period allowed by law. But the foregoing privilege shall not extend to articles which, owing to their quality or value, cannot be considered as samples, or which, owing to their nature, could not be identified upon re-exportation. The determination of the question of qualification of samples for duty-free admission rests in all cases exclusively with the competent authorities of the place where the importation is effected.

Art. XXIV

The nationals of each of the High Contracting Parties shall enjoy on the territory of the other the treatment granted to the nationals of the most favoured nation. They shall not be subjected there to any duties, rates or taxes, under any denomination whatever, other or higher than those imposed on the nationals of any foreign country.

Art. XXV

The High Contracting Parties declare that they mutually recognize for all corporations, and other commercial, industrial, financial, and insurance associations constituted and authorized under the particular laws of either of them, the right of free access to the tribunals of the other, subject to no other condition except that they conform to the laws of that country.

The said companies and associations of either of the High Contracting Parties shall have the right, if the laws and regulations of the other are not contrary to it, and subject to the fulfilment of all the formalities provided for by those laws and regulations, of exerting their activity and settling in the territory of the latter country; they shall enjoy, as regards their settlement, the same treatment as the companies and associations of the most favoured nation.

Art. XXVI

The Agreement of January 29th, 1921, regulating the commercial relations between France and Canada shall cease from operation at the date of the coming into force of the present Convention; and so shall the commercial Convention of 1907, amended in 1909, insofar as it was kept in force by the said Agreement.

Art. XXVII

This Convention after being approved by the French Chambers and by the Parliament of Canada shall be ratified and the ratifications exchanged at Paris as soon as practicable. It shall come into force immediately after the completion of that formality and shall remain in force until terminated by either of the High Contracting Parties after six months' notice to the other Party.

In witness whereof the respective Plenipotentiaries have signed this Convention and have affixed thereto their seals.

Done in duplicate at Paris, the 15th day of December, in the year 1922.

L.S.:	*L.S.:*
HARDINGE of PENSHURST.	R. POINCARÉ.
W. S. FIELDING.	L. DIOR.
E. LAPOINTE.	

SCHEDULES A, B, C, D, E, F

SCHEDULE A

CANADIAN PRODUCTS ENJOYING THE BENEFIT OF THE MINIMUM TARIFF OF FRANCE

Numbers of the French Tariff	Products
1	Horses.
17	Ham, boned and rolled; cooked hams, meat, salted.
18 *ter*	Poultry, truffled.
19	Meat, preserved in tins.
20	Extract of meat, in cakes, or otherwise.
20 *bis*	Guts.
Ex 26	Bed feathers.
Ex 30	Lard.
Ex 34	Eggs of poultry or game.
Ex 36	Cheese, Canadian.
41	Bone black (animal black).
45	Fresh fish (fresh water and sea water).
46	Fish, dried, salted or smoked.
49	Lobsters, fresh, preserved or prepared.
51	Fish oils.
52	Spermaceti.
53	Roe of cod and mackerel.
64 *bis*	Casein, hardened, etc.
68	Wheat, spelt and meslin (grain, flour).
69	Oats (grain, meal).
70	Barley (grain, meal).
71	Rye (grain, meal).
72	Maize (grain, meal).
73	Buckwheat (grain, meal).
84	Table fruits; fresh.
85	Table fruits; dried or drained.
86	Table fruits; candied or preserved.
91	Sugar.
93	Syrups, bonbons, candied fruits.
95	Preserves.
Ex 96	Coffee, roasted or ground.
Ex 110	Oil: linseed, cotton seed, sesame and maize.
115 *bis*	Tar.
117	Balsams.
Ex 128	Woods, common: Logs, rough, not squared, with or without the bark, of any length, and of a circumference at the thickest end of more than 60 centimetres.
	Wood, squared or sawn, 80 millimetres in thickness and above.
130	Stave wood.
131	Splints.
132	Hopwood and prepared poles.
133	Perches, poles and staffs, rough, etc.
135	Logs of 1 m. 10 c. in length or less.
135 *bis*	Resinous woods in logs, etc.
136	Charcoal and charred boon.
137	All other common woods.
158 *bis*	Cabbage for sauerkraut.
164	Fodder, turf for litter and dried beetroot pulp.
168	Cellulose pulp.
178 *bis*	Corundum in grits, emery, in powder.
178 *ter*	Emery on paper, etc.

SCHEDULE A—*Continued*

Numbers of the French Tariff	Products
190	Coal.
192	Coal tar.
194	Mineral wax or ozokerite.
197	Petroleum, schist, and other mineral illuminating oils.
198	Heavy oils and residue of petroleum and other mineral oils.
203	Aluminium.
221	Copper.
222	Lead.
224	Zinc.
225	Nickel.
227	Antimony.
021 and 022	Other ammonia salts
0148	Oxides of nickel.
0149	Sulphates of nickel (single and double).
0175	Oxide of zinc.
0187	Ethyl chloride.
0194	Methylic alcohol, crude (methylene).
0195	Methylic alcohol, rectified.
0199	Hexamethylenetetramine and its derivatives.
0201	Acetate of methyl.
0202	Solvents with an acetone and methyl acetate basis.
0204	Acetic anhydride.
0373	Wood creosote.
0381	Chemical products not specially mentioned.
298	Varnish and assimilated paints.
	Extracts, in paste or dry.
307	Talc pulverized.
312	Soaps, other than perfumed.
	Compound medicines:
315	Distilled waters.
316	Not specified.
318	Starch.
324	Glue manufactured from tendons of whales, etc.
325	Glue made from bones, sinews, skin, etc.
347	Porcelain.
359	Bottles, etc.
361	Incandescent electric lamps.
Ex 363	Yarns of linen, not glazed, single, unbleached, in skeins, up to 5,000 metres, etc.
Ex 363 *bis*	Yarns of linen, not glazed, twisted, unbleached, in skeins, up to 5,000 metres, etc.
366 *bis*	Yarns of phormium tenax, etc.
421 *bis*	Ribbons inked, etc., for typewriting and calculating machines, etc.
461	Paper and card.
461 *ter*	Duplicating paper, etc.
461 *quater*	Albumenised photographic paper, sensitised, etc.
462	Cardboard: In sheet or plates, etc.
477	Artificial leather, common, etc.
493	Peltries: Prepared, etc.
504	Movements of table or wall clocks, etc.
505	Electrometers, etc.
506	Tower clocks.
510	Steam engines, stationary and marine, etc.
512	Traction engines and rollers.
513	Tenders for steam locomotives.
521	Printing presses and machines, etc.
522	Agricultural machines (not including motors).
525	Machine tools.
525 *ter*	Typewriters, etc.
525 *quater*	Machines for rinsing, corking, etc.
526 *quinq*	Open boilers, etc.

SCHEDULE A—*Concluded*

Numbers of the French Tariff	Products
533	Component parts of machines, of steering, etc., of wrought or stamped iron or steel, of malleable cast iron, etc.
535	Component parts of copper, pure or alloyed, moulded, wrought, etc.
535 *bis*	Component parts of machines and shafting, not specified, of two or more metals, etc.
536	Dynamo armatures and component parts, etc.
537	Tools with or without handles, etc.
539	Stereotype blocks, plates, etc., for printing.
546	Pins, etc.
546 *bis*	Buckles, clasps, hooks, etc.
556	Manufactures of case-hardened cast-iron.
558	Building materials of iron or steel for building purpose, etc.
558 *bis*	Small articles not specified, of iron or steel, etc.
558 *ter*	Iron-work for carriages, etc.
559	Locks.
559 *bis*	Padlocks.
568	Household wares and all articles of iron, steel, etc.
569	Coffee-mills, etc.
570	Apparatus for water closets, lever or balance, etc.
574	Lamp-makers' and tinsmiths' wares, etc.
585 *bis*	Detonators for mines with an electric priming.
588	Miner's fuses.
592	Furniture other than bent wood: other than chairs, veneered on one or both sides, in all woods, pieces and separate parts.
592 *bis*	Other than bent wood: other than chairs, massive, and pieces, and separate parts.
593	Furniture covered (garnis), and upholstered, of all kinds.
593 *bis*	Caned, put together or not, or parts of such furniture.
600	Wood, planed, grooved, and (or) tongued, etc.
601	Doors, windows, Venetian blinds, etc.
601 *bis*	Wood, cut for roller blinds.
602	Small wooden wares.
Ex 604	Upright pianos.
614 *ter*	Automobiles.
Ex 620	Sheets of india-rubber, pure, not vulcanized and threads of vulcanized india-rubber.
620 *bis*	Manufactures of amianthus or asbestos.
620 *ter*	Mica in sheets or plates, etc.
635	Observation, geodetical and optical instruments, etc.
641	Small wares of other materials; tobacco pipes and stems of woods, native or exotic, etc.
642	Tobacco pipes entirely of wood.

NOTE 1.—The numbers of the tariff items have reference to the present French tariff.

NOTE 2.—The term "Ex" in the case of the number of an item means a part of the item to which the number refers.

NOTE 3.—When the term "Ex" is not used in the number of an item, the whole item is meant.

SCHEDULE B

CANADIAN PRODUCTS WHICH SHALL ENJOY THE BENEFIT OF THE PERCENTAGES OF REDUCTION MENTIONED, SUCH PERCENTAGES TO BEAR ON THE DIFFERENCE BETWEEN THE RATES OF THE GENERAL TARIFF AND THOSE OF THE MINIMUM TARIFF.

Numbers of the French Tariff	Products	Percentages
4	Oxen	85 p.c.
5	Cows	85 p.c.
6	Bulls	85 p.c.
7	Steers, bullocks and heifers	85 p.c.
8	Calves	85 p.c.
9	Rams, ewes and wethers	80 p.c.
10	Lambs, weighing 10 kilogs and less	85 p.c.
12	Pigs	85 p.c.
Ex 14 *bis*	Poultry	50 p.c.
16	Meat, fresh, including meat preserved by freezing	85 p.c.
17 *bis*	Pork butchers' products	80 p.c.
Ex 18	Poultry, dead	50 p.c.
31	Margarine, oleomargarine, alimentary fats and similar substances	60 p.c.
35 *bis*	Milk condensed, pure	50 p.c.
35 *ter*	*a.* Milk condensed, with an addition of sugar	50 p.c.
	b. Milk food, with an addition of sugar	75 p.c.
37	Butter: fresh or melted, or salted	75 p.c.
38	Honey	50 p.c.
47	Fish: preserved by pickling, or otherwise prepared	60 p.c.
74	Malt	60 p.c.
76	Groats, grits (coarse flour) pearled or clean grain	60 p.c.
80	Pulse	85 p.c.
83	Potatoes	85 p.c.
89	Seeds for sowing	80 p.c.
98	Chocolate	85 p.c.
110 *bis*	Fixed oils, boiled or oxidized	50 p.c.
111 *bis*	Alimentary vegetable fat	60 p.c.
Ex 128	Wood, squared or sawn, less than 80 millimetres but exceeding 35 millimetres in thickness	60 p.c.
	Wood, sawn, 35 millimetres in thickness or less	50 p.c.
129	Paving blocks	80 p.c.
136 *bis*	Straw or wool of wood	60 p.c.
158	Vegetables: fresh, salted or pickled, preserved, dried	85 p.c.
160	Hops	80 p.c.
161	Lupuline	80 p.c.
165	Bran, from any kind of cereal	65 p.c.
185	Cement	50 p.c.
193 *bis*	Bitumen and asphalt: tiles, paving blocks or slabs	60 p.c.
199	Paraffin, vaseline	50 p.c.
205	Cast iron	40 p.c.
205 *bis*	Ferro-manganese, ferro-silicon, etc	40 p.c.
206	Iron, crude, and crude steel in ingots	40 p.c.
207	Iron or steel, rolled or forged in blooms, billets or bars	40 p.c.
207 *bis*	Iron or steel rolled or forged in bars of 3 millimetres or less in their thinnest parts, plain or ornate mouldings, or iron in intermittent relief work	40 p.c.
207 *ter*	Fine steel for tools	40 p.c.

SCHEDULE B—*Continued*

Numbers of the French Tariff	Products	Percentages
207 *quater* and *quinq*.....	Special steel	40 p.c.
208	Iron or steel, machine	40 p.c.
209	Hoop iron or steel, hot rolled	40 p.c.
209 *bis*	Cold-rolled	40 p.c.
210	Flat sheet	40 p.c.
210 *bis*	Flat sheets of nickel steel	40 p.c.
210 *ter*	Bands, hot rolled	40 p.c.
211	Iron, tinned (tin plate), coated with copper, lead, or zinc	40 p.c.
212	Wire of iron or steel	40 p.c.
212 *bis*	Iron shavings	40 p.c.
Ex 213	Rails of iron or ordinary steel	40 p.c.
214	Wheels, tires, and wheel centres of iron or steel	40 p.c.
215	Straight axles for railways and tramways, axles not specially mentioned, of iron or steel	50 p.c.
216	Crank-axles for locomotives, of iron or steel	40 p.c.
217	Axles for automobiles, of iron or steel	40 p.c.
04	Arseniate of soda	25 p.c.
07 to 010	Nitric acid and sulphonitric	25 p.c.
019	Sulphate of ammonia, crude	30 p.c.
020	Sulphate of ammonia, refined	25 p.c.
028	Borate of sodium (refined borax)	25 p.c.
029	Perborate of sodium	25 p.c.
033	Carbide of calcium	15 p.c.
038	Cyanide of potassium	25 p.c.
039	Cyanide of sodium	25 p.c.
046	Chlorates of barium, potassium, sodium	25 p.c.
047	Perchlorates of ammonia and others	25 p.c.
048	Chloride of calcium	25 p.c.
055	Iodine, crude	25 p.c.
056	Iodine, refined	25 p.c.
057 and 058	Iodides	25 p.c.
060	Eau oxygenee	25 p.c.
062	Phosphorus	25 p.c.
063	Chlorides of phosphorus	25 p.c.
064	Phosphoric acids	25 p.c.
065	Phosphoric anhydride	25 p.c.
066	Pharmaceutical phosphates of lime	25 p.c.
068	Phosphates of sodium	25 p.c.
069	Silicate of potassium or of sodium	25 p.c.
071	Sulphur, precipitated	25 p.c.
072	Chloride of sulphur	25 p.c.
073	Sulphuric acid	25 p.c.
074	Sulphurous acid, liquefied	25 p.c.
075	Sulphite of sodium	25 p.c.
076	Bisulfite of sodium, liquid	25 p.c.
077	Meta-or pyrosulphite of sodium	25 p.c.
078	Sulphite and bisulphite of calcium	25 p.c.
079	Sulphite, bisulphite and metabisulphite of potassium	25 p.c.
080	Hyposulphite of sodium	25 p.c.
081	Sulphite of sodium	25 p.c.
082	Persulphates of ammonium, potassium, sodium	25 p.c.
0104	Carbonate, gallate (sub), nitrates, salicylates, tribromophenate of bismuth	25 p.c.
0105	Other salts of bismuth	25 p.c.
0106	Calcium	25 p.c.
0107	Carbonate of calcium, precipitated	25 p.c.
0108	Chloride of calcium	25 p.c.
0109	Hydride of calcium	25 p.c.
0110	Other salts of calcium	25 p.c.
0118	Other oxides of cobalt	35 p.c.

SCHEDULE B—*Continued*

Numbers of the French Tariff	Products	Percentages
0119	Hydrated salts of cobalt	35 p.c.
0120	Other salts of cobalt	35 p.c.
Ex 0122	Oxides of copper, other	35 p.c.
0130	Oxides of iron	25 p.c.
0134	Magnesium	25 p.c.
0135	Calcined magnesia	25 p.c.
0136	Carbonate of magnesium	25 p.c.
0137	Chloride of magnesium	25 p.c.
0138	Citrate of magnesium	25 p.c.
0139	Sulphate of magnesium	25 p.c.
0140	Sulphate of magnesium and potassium	25 p.c.
0142	Bioxyde (peroxyde) of manganese, pure	25 p.c.
0143	Permanganate of potassium	25 p.c.
0144	Chlorides, nitrates, oxides, sulphates of mercury	25 p.c.
0145	Sulphide of mercury	25 p.c.
0146	Other salts of mercury	25 p.c.
0150	Carbonate of lead (white lead)	25 p.c.
0151	Oxides of lead	25 p.c.
0152	Sulphate of lead, crushed	25 p.c.
0156	Caustic potash	25 p.c.
0157	Carbonate of potassium	25 p.c.
0158	Chloride of potassium	25 p.c.
0159	Sulphate of potassium	25 p.c.
0163	Sodium (metal)	25 p.c.
0164	Chloride of sodium refined, white	25 p.c.
0165	Chloride of sodium, other	25 p.c.
0165 *bis*	Caustic soda	25 p.c.
0165 *ter* 0165 *quat*	Soda, natural or artificial	25 p.c.
0165 *quinq*	Bicarbonate of sodium	25 p.c.
0166	Sulphate of sodium	25 p.c.
0167	Oxides and salts of strontium not specially mentioned	25 p.c.
0171	Radium and radium-bearing products	25 p.c.
0173	Carbonate of zinc other than native	25 p.c.
0174	Chloride of zinc	25 p.c.
0176	Sulphate of zinc	25 p.c.
0177	Sulphide of zinc	25 p.c.
0179	Coal oil, coal essence, benzenic, carbides, benzine, toluene, etc	25 p.c.
0179	Heavy oils (products distilling above 200°)	40 p.c.
0186	Other chlorals and derivatives of chloral	25 p.c.
0188	Methyl chloride	25 p.c.
0189	Monochloracetic acid	25 p.c.
0190	Acetyl chloride	25 p.c.
0191	Iodoform	25 p.c.
0192	Iodides of ethyl, of methyl	25 p.c.
0193	Amylic alcohol	25 p.c.
0196	Glycerine	25 p.c.
0197	Formic aldehyde in solution at 40 p.c	35 p.c.
0198	Trioximethylene	35 p.c.
0200	Acetone	35 p.c.
0203	Acetic acid	35 p.c.
0205	Acetate or pyrolignite of lime	50 p.c.
0208	Acetate of lead	40 p.c.
0210	Acetate or pyrolignite of sodium, crystallized or hydrated	40 p.c.
0211	Acetate of sodium, other	40 p.c.
0215	Tartaric acid	25 p.c.
0217	Oleic acid; of animal origin, other than fish fat	25 p.c.
0219	Stearic acid	25 p.c.
0234	Tannic acid (tanin)	25 p.c.

SCHEDULE B—*Continued*

Numbers of the French Tariff	Products	Percentages
0237	Sulphate of methyl	25 p.c.
0238	Acetic ether and sulphuric ether	25 p.c.
0241	Cyanacetic ether	25 p.c.
0242	Chloracetic ether	25 p.c.
0243	Hydrochloric ether	25 p.c.
0244	Acetylacetic ether	25 p.c.
0245	Chlorocarbonic ether	25 p.c.
0246	Diethysulphonedimethylmethane (sulphonal)	25 p.c.
0247	Diethylsulphonethylmethylmethane (trional)	25 p.c.
0249	Diethylmalonyluree (veronal)	25 p.c.
0250	Collodion	25 p.c.
0253	Nitrobenzine, crude nitrotoluen, etc	25 p.c.
0254	Dinitrobenzine, etc	25 p.c.
0255	Monochlorobenzine, etc	25 p.c.
0256	Chloride of benzyl	25 p.c.
0257	Chloride of benzylidene	25 p.c.
0258	Paranitroluene, etc	25 p.c.
0259	Dinitroxylone-sulphonate of sodium, etc	25 p.c.
0260	Trichloride of benzyl	25 p.c.
0261	Parabromonitrobenzol	25 p.c.
0262	Cyanide of benzyl	25 p.c.
0263	Pure phenol, etc	25 p.c.
	Cresols, etc	25 p.c.
0264	Parachlorophenol	25 p.c.
0265	Alpha and betanaphthols, etc	25 p.c.
0266	Mononitrophenols, etc	25 p.c.
0267	Orthonitroanisol, anisol	25 p.c.
0268	Sulphonic dinitrophenol, etc	25 p.c.
0268 *bis*	Resorsine	25 p.c.
0269	Ortho and paranitrophenol	25 p.c.
0270	Halogenic, derivatives, etc	25 p.c.
0271	Metamidophenol, etc	25 p.c.
0272	Pyrogallol (pyrogallic acid)	25 p.c.
0273	Sulphate of monomethylparamidophenol	25 p.c.
0274	Hydrochlorate of monomethylparamidocresol	25 p.c.
0275	Naphtol B, medicinal	25 p.c.
0276	Acetylparamidophenol	25 p.c.
0277	Pyrocatechine	25 p.c.
0278	Veratrol	25 p.c.
0279	Guaiacol	40 p.c.
0280	Salts and derivatives of guaiacol	25 p.c.
0281	Isobutylorthocresol	25 p.c.
0282	Iodophenol	25 p.c.
0283	Iodoanisol	25 p.c.
0284	Cresotinic acids	25 p.c.
0285	Salycilic acid, etc	25 p.c.
0286	Benzoic acid	25 p.c.
0287	Nitro and amidosalicylic acids, etc	25 p.c.
0288	Nitrated and amidic derivatives of benzoic acid, etc	25 p.c.
0289	Dichloro-and tetrachlorophthalic acids, etc	25 p.c.
0290	Naphthoic acids, etc	25 p.c.
0291	Resorcylic B acid, etc	25 p.c.
0292	Salicylates, not specially mentioned	25 p.c.
0293	Salicylates of ethyl and of methyl	25 p.c.
0294	Salicylates of phenyl (salol)	25 p.c.
0295	Benzoates, not specially mentioned	25 p.c.
0296	Acetylsalicylic acid	25 p.c.
0297	Anhydrous benzoic acid	25 p.c.
0298	Benzoate and salicylate of naphtol	25 p.c.
0299	Acetylparamidosalol	25 p.c.

SCHEDULE B—*Continued*

Numbers of the French Tariff	Products	Percentages
0300	Chloride of paranitrobenzol	25 p.c.
0301	Salicylnitrophenol	25 p.c.
0302	Metaoxiparaminobenzoic acid	25 p.c.
0303	Metaoxiparanitrobenzoic acid	25 p.c.
0304	Metanitroparaoxibenzoic acid	25 p.c.
0305	Metaaminoparaoxibenzoic acid	25 p.c.
0306	Acetanilide	25 p.c.
0307	Phenylacetanilide, etc	25 p.c.
0308	Metylacetanilide	25 p.c.
0309	Paranitroacetanilide	25 p.c.
0310	Aniline, etc	25 p.c.
0310 *bis*	Betanaphthylamine and its salts	25 p.c.
0311	Paratoluidine, etc	25 p.c.
0312	Mono and di-ethylanilines, etc	25 p.c.
0313	Paranitro orthotoluidine, etc	25 p.c.
0314	Benzidine, etc	25 p.c.
0315	Ortho and meta-nitranilines, etc	25 p.c.
0316	Diethylmetasulphanilic acid, etc	25 p.c.
0317	Sulphonic totylnaphthylamine acids, etc	25 p.c.
0318	Quinaldine, etc	25 p.c.
0319	Methylquinoleine, etc	25 p.c.
0320	Paranitrobenzoate of ethyl	25 p.c.
0321	Orthoanisidine	25 p.c.
0322	Phenacetine	25 p.c.
0324	Benzaldehyde	25 p.c.
0325	Halogenic, etc., derivatives	25 p.c.
0326	Tetramethyldiamidobenzophenone, etc	25 p.c.
0330	Analgesine and its salts	25 p.c.
0360	Nicotine	25 p.c.
0377	Extracts of gallnuts and sumac, etc	25 p.c.
0379	Phosphated fertilizers	25 p.c.
300	Black: Various	25 p.c.
301	Pencils	60 p.c.
302	Carbons, artificial ("agglomérés") and charked ("cuits") for electricity and other industrial uses	25 p.c.
308	Colours ground in oil	60 p.c.
311	Perfumery:	
	Soaps	60 p.c.
	Others	75 p.c.
317	Chicory, roasted, etc	25 p.c.
319 *ter*	Dextrine, etc	60 p.c.
321	Candles	50 p.c.
322	Wax and stearic acid, manufactured otherwise than in candles	25 p.c.
327 *bis*	Casein, etc	75 p.c.
330	Blacking, creams, etc	75 p.c
347 *bis*	Articles for electricity, of porcelain, etc	50 p.c.
349 *quin*	Glass articles for electric lighting, without fittings of metal	50 p.c.
359 *bis*	Bottles, phials, etc., furnished with mechanical stoppers	50 p.c.
359 *ter*	Bottles, phials, etc., with emery-ground stoppers	25 p.c.
362	Glass articles not otherwise mentioned	50 p.c.
367	Glazed yarns, twine, cordage, of hemp, linen, etc	75 p.c.
404	Tissues of pure cotton, plain, twilled and drills	40 p.c.
418	Blankets of cotton	25 p.c.
428 *bis*	Incandescent mantles, etc	75 p.c.
438 to 454	Tissues of wool, pure or mixed	40 p.c
460 *sex*	Other made up articles	40 p.c. of the surtax
461 *bis*	Wall paper (other than Lincrusta-Walton and the like)	60 p.c.
462 *bis*	Cardboard: moulded, reinforced or not, called papier mâché, etc	60 p.c.

SCHEDULE B—*Continued*

Numbers of the French Tariff	Products	Percentages
463	Cardboard: cut, grooved, or shaped	60 p.c.
464	Cardboard boxes, etc	60 p.c.
464 *bis*	Cylindrical and conical tubes, so-called " busettes " for spinning and weaving	50 p.c
464 *ter*	Cardboard wares ("cartonages") ornamented with paintings, etc	50 p.c.
464 *quart*	Lincrusta and the like	50 p.c.
465	Articles of cardboard or of cellulose: moulded, compressed, etc	80 p.c.
465 *bis*	Articles of cardboard or of cellulose: lacquered or covered with a uniform varnish	80 p.c.
465 *ter*	The same with painted or inlaid decorations	50 p.c.
469	Engravings, facsimiles of engravings, etc	25 p.c.
469 *quater*	Rolls or bands for cinematographs	50 p.c.
470	Printed matter of all kinds, etc	40 p.c.
476	Skins and hides prepared	75 p.c.
477 *bis*	Artificial leather with balata, etc	30 p.c.
478	Straps for clogs, etc	40 p.c.
479	Uppers for topboots, etc	40 p.c.
480	Top-boots (bottes)	40 p.c
481	Boots or half boots	40 p.c.
482	Low shoes and ankle shoes	40 p.c.
483	Footwear for children, etc	40 p.c.
484	Gloves	40 p.c.
485	Articles of fine saddlery (other than saddles)	30 p.c.
486	Saddles	40 p.c.
487	Harness-wares	40 p.c.
488	Leather transmission belts, etc	40 p.c.
489	Artificial leather transmission belts, etc	40 p.c.
490	Trunks	75 p.c.
491	Wares of morocco leather	40 p.c.
491 bis	Covers of albums	40 p.c.
491 ter	Albums for collections	40 p.c.
492	Clothing of all kinds, without fur parts, etc Other articles not specially mentioned	50 p.c.
494	Peltries: worked or made up	75 p.c.
495	Jewellery, goldsmiths' wares	40 p.c.
496	Articles gilt or silvered	40 p.c.
496 *bis*	Imitation jewellery, etc	30 p.c.
504 *bis*	Table and wall clocks, etc	75 p.c.
504 *ter*	Jewel clocks, etc	75 p.c.
509	Clock and watch fittings	75 p.c.
511	Steam engines portable, etc	30 pc.
511 *bis*	Steam engines semi-fixed, etc	30 p.c.
520	Paper-making machines	50 p.c.
521 *bis*	Machines for folding, etc	50 p.c.
523	Sewing machines	50 p.c.
524	Dynamo-electric machines	40 p.c.
524 *bis*	Electric and electro-technical apparatus	40 p.c.
525 *bis*	General machinery, etc.	60 p.c.
525 *sex*	Complete apparatus not elsewhere mentioned	40 p.c.
526 *sex*	Heaters	40 p.c.
527 *bis*	Refrigerating apparatus	30 p.c.
532	Detached parts of machines, etc.	40 p.c.
532 *ter*	Fly wheels for machines	40 p.c.
533 *bis*	Straight axle-trees, etc.	25 p.c.
533 *ter*	Straight shafts, solid	25 p.c.
533 *quat*	Straight shafts, bored, etc.	25 p.c.
533 *sex*	Component parts of boilers	25 p.c.
533 *sept*	Balls for ball bearings	75 p.c.
533 *oct*	Rough frames and bodies of dynamos	25 p.c.

SCHEDULE B—*Continued*

Numbers of the French Tariff	Products	Percentages
534	Springs of steel for carriages, etc	75 p.c.
535 *ter*	Wires and cables, insulated, etc.	50 p.c.
536 *bis*	Electric arc-lamps, etc.	50 p.c.
541	Wire gauze of iron or steel	60 p.c.
542	Wire gauze of copper or brass	60 p.c.
543	Wire netting of iron or steel	50 p.c.
Ex 549	Cutlery, fine and blades of razors	40 p.c.
552	Railway chairs, etc.	40 p.c.
554	Iron castings for machinery or for ornament	30 p.c.
555	Other than parts of machines, etc.	60 p.c.
555 *bis*	Ribbed cylinders and cylinders with water jackets, pistons, etc.	40 p.c.
557	Stoves, fire-places, heaters, etc.	40 p.c.
557 *bis*	Manufactures of cast iron: pots and other articles, etc	40 p.c.
559 *ter*	Hinge-plates, etc.	40 p.c.
559 *quat*	Keys, iron lock bolts of all kinds, etc	40 p.c.
561	Cables of iron and steel	40 p.c.
561 *bis*	Barbed fencing wire	30 p.c.
562	Anchors	40 p.c.
562 *bis*	Chains of iron or steel	30 p.c.
563	Nails: for shoeing animals, etc	40 p.c.
564	Other kinds of nails	40 p.c.
565	Nails of wire, etc.	30 p.c.
566	Screws, eyebolts, strap hinges, etc	40 p.c.
566 *bis*	Same articles, turned or "décolletés"	30 p.c.
566 *ter*	Split washers	40 p.c.
567	Tubes of iron or steel	30 p.c.
567 *bis*	Tubes and worms, pressed, etc	30 p.c.
571	Buckles for saddlery, etc	30 p.c.
572 *bis*	Tools of copper, etc	40 p.c.
575	Other wares not otherwise mentioned	40 p.c.
576	Lead pipes and manufactured lead, etc	40 p.c.
576 *ter*	Electric accumulators and component parts	30 p.c.
576 *quat*	Dry cells	60 p.c.
577	Tin pots and other manufactures of tin	30 p.c.
579	Articles of nickel, etc	60 p.c.
579 *bis*	Manufactures of aluminium, etc	30 p.c.
590	Furniture, of bent wood, put together or not, pieces and parts of furniture of bent wood	40 p.c.
590 *bis*	Bottoms for chairs or for backs	40 p.c.
591	Furniture other than bent wood	40 p.c.
591 *bis*	Pieces and separate parts of chairs	40 p.c.
595	Casks empty, serviceable, fitted together or not	50 p.c.
597	Builders "and cartwrights" wood, shaped	50 p.c.
602 *bis*	Manufactures of turned wood, etc	40 p.c.
602 *ter*	Vats and tubs, put together or not	25 p.c.
602 *quat*	Felloes of wood	30 p.c.
603	Wood, squared, for shuttles, under 500 grammes in weight	40 p.c.
603 *bis*	Shuttles for weaving	60 p.c.
603 *ter*	Handles for agricultural instruments, etc	50 p.c.
603 *quat*	Other manufactures of wood	50 p.c.
Ex 604	Pianos, grand	40 p.c.
	Organs, harmoniums, etc	40 p.c.
	Phonographs, gramophones, and the like, with cylinders or disks, etc	40 p.c.
	Cylinders and disks of mineral wax, etc	40 p.c.
Ex 605	Accessories and detached pieces of musical instruments (for instruments enumerated in Article Ex 604)	40 p.c.
Ex 614	Carriages not to run on rails	60 p.c.
614 *bis*	Cycles and parts thereof	40 p.c.
615, 616 and 617	Vessels in a fit state for use, hulls of seagoing ships of wood, river boats of all sizes	40 p.c.
618 *ter*	Motor boats with electric or explosion motor	30 p.c.

SCHEDULE B—*Concluded*

Numbers of the French Tariff	Products	Percentages
Ex 620	Manufactures of india-rubber and gutta-percha, with the exception of sheets of india-rubber and threads of vulcanized india-rubber (paragraphs 1 & 2)	40 p.c.
621	Felt for sheathing and for soles	40 p.c.
622	Felt for printed carpets	40 p.c.
623	Felt and felted cloths for machines, etc	40 p.c.
623 *bis*	Felted tissues for paper making	40 p.c.
624	Felt for articles of clothing, etc	60 p.c.
625	Felt, all other	60 p.c.
630 *quat*	Articles for use in acetylene lighting, etc	30 p.c.
634 *bis*	Surveying instruments, levelling instruments, plan drawing instruments: water levels, simple spirit levels	50 p.c.
634 *quat*	Instruments and apparatus for demonstration and instruction.	30 p.c.
635 *bis*	Photographic apparatus	50 p.c.
Ex 636	Penholders and component parts:	
	Fountain pens, or stylographs, with or without nib or point	50 p.c.
644 *bis*	Paint and other brushes	40 p.c.
647 *bis*	Corsets	40 p.c.

NOTE 1.—The numbers of the tariff items have reference to the present French tariff.

NOTE 2.—The item "Ex" in the case of the number of the items means a part of the item to which the number refers.

NOTE 3.—When the term "Ex" is not used in the number of an item, the whole item is meant.

NOTE 4.—"P.c." means the percentage of difference between the rates of the general tariff and of the minimum tariff.

SCHEDULE C

CANADIAN PRODUCTS ENJOYING THE BENEFIT OF THE LOWEST TARIFF IN FORCE OF ST. PIERRE AND MIQUELON

Numbers of the Saint-Pierre and Miquelon Tariff	Products
1	Live animals of all kinds
3	Meat, salted, etc.
4	Pork butchers' produce and salted pork.
6	Preserved meat, etc.
9	Lard.
10	Margarine.
14	Milk condensed.
15	Cheese.
16	Honey.
17	Butter, fresh, melted or salted.
22	Lobster and salmon preserved in natural state.
	Flour:
32	Of wheat.
33	Of Maize.
34	Other.
36	Oats, barley, rye, etc.
37	Ships' biscuit and bread.
41	Fresh fruits.
42	Potatoes.
	Table fruits:
44	Dried or drained.
45	Candied or preserved.
46	Seeds for sowing.
48	Sugar, refined.
50	Syrup, bonbons and candied fruits.
53	Coffee of all kinds.
54	Cocoa and chocolate of all kinds, sweetened and unsweetened.
—	Motor boats.

SCHEDULE D

FRENCH PRODUCTS RECEIVING FIXED RATES OF DUTY

Numbers of the Canadian Tariff	Products	Duties
8	Canned meats, canned poultry and game; extracts of meats and fluid beef not medicated, and soups of all kinds..	20 p.c.
81	Trees, viz:—Apple, cherry, peach, pear, plum and quince, of all kinds, and small peach trees known as June buds ....each	2 cents.
82	Grape vines; gooseberry, raspberry, currant and rose bushes; fruit plants, n.o.p.; trees, plants and shrubs, commonly known as nursery stock, n.o.p	15 p.c.
Ex 86	Vegetables, tomatoes excepted, including baked beans, in cans, or other air-tight packages, n.o.p., the weight of the cans or other packages to be included in the weight for duty ....per pound	1 cent.
105	Fruits in air-tight cans, or other air-tight packages, n.o.p., the weight of the cans or other packages to be included in the weight for duty....per pound	2 cents.
120	Anchovies, sardines, sprats and other fish, packed in oil or otherwise, in tin boxes, the weight of the tin box to be included in the weight for duty:	
	(*a*) When weighing over twenty ounces and not over thirty-six ounces each ....per box	4 cents.
	(*b*) When weighing over twelve ounces and not over twenty ounces each ....per box	3 cents.
	(*c*) When weighing over eight ounces and not over twelve ounces each....per box	2½ cents.
	(*d*) When weighing eight ounces each or less ....per box	2 cents.
Ex 160	Alcoholic perfumes and perfumed spirits, bay rum, cologne and lavender waters, hair, tooth and skin washes, and other toilet preparations containing spirits of any kind:	
	(*a*) When in bottles or flasks containing not more than four ounces each	75 p.c.
162	Medicinal or medicated wines, including vermouth and ginger wine, containing not more than forty per cent of proof spirit	70 p.c.
Ex 163	Wines of the fresh grape of all kinds, not sparkling, imported in barrels or in bottles:	
	(*a*) Containing 20 p.c. or less proof spirit (1) per gallon	15 cents.
	(*b*) Containing more than 20 p.c. and not more than 23 p.c. proof spirit (2)....per gallon	20 cents.
	(*c*) Containing more than 23 p.c. and not more than 26 p.c. of proof spirit(3)....per gallon	25 cents.
	(*d*) Containing more than 26 p.c. proof spirit until the strength reaches forty per cent of proof spirit per gallon	55 cents.
	And in addition thereto for each degree of strength in excess of twenty-six per cent of proof spirit until the strength reaches forty per cent of proof spirit	3 cents.
	Provided that six quart(4) bottles, or twelve(5) pint bottles, shall be held to contain a gallon for duty purposes under this item.	

(1) Or 11° 4 by centesimal alcoholometer.
(2) Or 13° 2 by centesimal alcoholometer.
(3) Or 14° 9 by centesimal alcoholometer.
(4) Equal to .946 of a litre.
(5) Equal to .473 of a litre.

SCHEDULE D—*Continued*

Numbers of the Canadian Tariff	Products	Duties
169	Books, viz: Novels or works of fiction, or literature of a similar character, unbound or paper bound or in sheets, but not to include Christmas annuals, or publications commonly known as juvenile and toy books	15 p.c.
178	Advertising and printed matter, viz:—Advertising pamphlets, advertising show cards, illustrated advertising periodicals; price books, catalogues and price lists; advertising almanacs and calendars; patent medicine or other advertising circulars, fly sheets or pamphlets; advertising chromos, chromo-types, oleographs or like work produced by any process other than hand painting or drawing, and having any advertisement or advertising matter printed, lithographed or stamped thereon, or attached thereto, including advertising bills, folders and posters, or other similar artistic work, lithographed, printed or stamped on paper or cardboard for business or advertisement purposes, n.o.p. ....per pound	12½ cents.
182	Printed music, bound or in sheets, and music for mechanical piano players	5 p.c.
Ex 220	All medicinal, chemical and pharmaceutical preparations, compounded of more than one substance, including patent and proprietary preparations, tinctures, pills, powders, troches, lozenges, syrups, cordials, bitters, anodynes, tonics, plasters, liniments, salves, ointments, pastes, drops, waters, essences and oils, n.o.p.:	
	(*a*) When dry	22½ p.c.
	(*b*) Liquid, when containing not more than two and one-half per cent of proof spirit	30 p.c.
	Provided that drugs, pill-mass and preparations, not including pills or medicinal plasters, recognized by the British or the United States pharmacopoeia, or the French Codex as officinal, shall not be held to be covered by this item.	
234	Perfumery, including toilet preparations, non-alcoholic, viz, hair oils, tooth and other powders and washes, pomatums, pastes and all other perfumed preparations, n.o.p., used for the hair, mouth or skin	25 p.c.
262	Olive oil, n.o.p.	15 p.c.
264	Essential oils, n.o.p., including bay oil, otto of limes, and peppermint oil	5 p.c.
287	Tableware of china, porcelain, white granite or ironstone	20 p.c.
438	Locomotives and motor cars, for railways and tramways and automobiles and motor vehicles of all kinds...	25 p.c.
526	White and cream coloured lace and embroideries, of cotton or linen	15 p.c.
568	Knitted undershirts, knitted drawers and knitted goods, n.o.p.	25 p.c.
573 *a*	Church vestments of any material	15 p.c.
575	Embroideries, n.o.p.; lace, n.o.p.; braids, n.o.p.; tapes of cotton or linen not over one and one-quarter inches in width, not including measuring tape lines; fringes, n.o.p.; cords; elastic, round or flat; garter elastic; tassels; handkerchiefs of all kinds; lace collars and all manufactures of lace; nets and nettings of cotton, linen, silk and other material, n.o.p.; shams and curtains, when made up, trimmed or untrimmed.....	27½ p.c.
Ex 581	Velvets, velveteens, silk velvets and plush not over twenty-four inches in width	20 p.c.
Ex 581	Silk fabrics not over twenty-six inches in width	20 p.c.
582	Ribbons of all kinds and materials	25 p.c.

SCHEDULE D—*Concluded*

Numbers of the Canadian Tariff	Products	Duties
583	Manufactures of silk or of which silk is the component part of chief value, n.o.p.	30 p.c.
603	Fur skins, wholly or partially dressed, n.o.p.	12½ p.c.
618	Rubber cement and all manufactures of india-rubber and gutta percha, n.o.p.	20 p.c.
627	Gloves and mitts, of all kinds	25 p.c.
634	Feathers and manufactures of feathers, n.o.p.; artificial feathers, fruits; grains, leaves and flowers suitable for ornamenting hats	22½ p.c.
657 *a*	Cinematograph or moving picture films, positives, one and one-eighth of an inch in width and over, per linear foot	1½ cents.

Note 1.—The numbers of the tariff items have reference to the present Canadian tariff.

Note 2.—Abbreviation: n.o.p. means "not otherwise provided for" elsewhere in the Canadian tariff.

Note 3.—The term "Ex" in the case of the number of an item means a part of the item to which the number refers.

Note 4.—When the term "Ex" is not used in the number of the item, the whole item is meant.

SCHEDULE E

FRENCH PRODUCTS RECEIVING THE INTERMEDIATE TARIFF LESS A DISCOUNT OF TEN PER CENT ON THE AMOUNT OF DUTY.

Numbers of the Canadian Tariff	Products
17	Cheese.
66	Biscuits, sweetened.
72	Garden, field and other seeds for agricultural or other purposes, n.o.p., sunflower, canary, hemp and millet seed, when in packages weighing over one pound each.
73	Garden, field and other seeds for agricultural or other purposes, n.o.p., sunflower, canary, hemp and millet seed, when in packages weighing one pound each or less.
78	Florist stock, viz: Palms, ferns, rubber plants (Ficus), gladiolus, cannas, dahlias and peonias.
94	Dates and figs, dried.
99	Prunes and dried plums, unpitted; raisins and dried currants.
109	Nuts of all kinds, n.o.p., including shelled peanuts.
114	Nuts, shelled, n.o.p.
141	Sugar candy and confectionery, n.o.p., including sweetened gums, candied peel, candied pop-corn, candied fruits, candied nuts, flavouring powders, custard powders, jelly powders, sweetmeats, sweetened breads, cakes, pies, puddings, and all other confections containing sugar, the weight of the wrappings and cartons to be included in the weight for duty.
Ex 156	Cognac brandy and Armagnac brandy.
	When there is furnished with the bill of entry a certificate of analysis and purity as defined in Article XX of this Convention.
Ex 165	Champagne.
	When there is furnished with the bill of entry a certificate of analysis and purity as defined in Article XX of this Convention.

SCHEDULE E—*Continued*

Numbers of the Canadian Tariff	Products
170	Freight rates for railways, and telegraph rates bound in book or pamphlet form, and time-tables of railways outside of Canada.
171	Books, printed, periodicals and pamphlets, or parts thereof, n.o.p., not to include blank account books, copy books, or books to be written or drawn upon.
179	Labels for cigar boxes, fruits, vegetables, meats, fish, confectionery, or other goods or wares; shipping, price or other tags, tickets or labels, and railroad or other tickets, whether lithographed or printed, or printed, n.o.p.
180	Photographs, chromos, chromotypes, artotypes, oleographs, drawings, paintings, pictures, decalcomania transfers of all kinds, engravings or prints or proofs therefrom, and similar works of art, n.o.p.; blueprints, building plans, maps, and charts, n.o.p.
192	Strawboard, millboard and cardboard, not pasted or coated; tarred paper, felt-board, sandpaper, glass or flintpaper and emery paper, or emery cloth.
197	Paper of all kinds, n.o.p.
198	Ruled and border and coated papers, boxed papers, pads not printed, papier-maché ware, n.o.p.
199	Papeteries, envelopes, and all manufactures of paper, n.o.p.
228	Soap powders; powdered soap, mineral soap, and soap, n.o.p.
230	Castile soap.
232	Glue, liquid, powdered or sheet, and mucilage, gelatine, casein, adhesive paste and isinglass.
237	Celluloid, moulded into sizes for handles of knives and forks, not bored or otherwise manufactured; moulded celluloid balls and cylinders, coated with tinfoil or not; but not finished or further manufactured; and celluloid lamp shade blanks and comb blanks.
245	Ochres, ochrey earths, siennas and umbers.
252	Shoe blacking; shoemakers' ink; shoe, harness and leather dressing, and knife or other polish or composition, n.o.p.
316 *a*	Incandescent lamp bulbs and glass tubing for use in the manufacture of incandescent lamps, and mantle stocking for gas light.
318	Common and colourless window glass.
322	Plate glass, n.o.p.
326 *a*	Articles of glass, not plate or sheet, designed to be cut or mounted; and manufactures of glass, n.o.p.
327	Spectacles, eyeglasses, and ground or finished spectacles or eyeglass lenses.
339	Lead, manufactures of n.o.p.
352	Brass and copper nails, tacks, rivets and burrs or washers; bells and gongs, n.o.p.; and manufactures of brass or copper, n.o.p.
354	Manufactures of aluminium, n.o.p.
362	Articles consisting wholly or in part of sterling or other silverware, nickel-plated ware, gilt or electro-plated ware, n.o.p.; manufactures of gold and silver, n.o.p.
368	Clocks, watches, time recorders, clock and watchkeys, clock cases, and clock movements.
405	Buckthorn strip fencing, woven wire fencing, and wire fencing of iron or steel, n.o.p., not to include woven wire or netting made from wire smaller than number fourteen gauge nor to include fencing of wire larger than number nine gauge.
406	Wire of all metals and kinds, n.o.p.
407	Wire, single or several, covered with cotton, linen, silk, rubber or other material, including cable so covered.
409	Wire cloth or woven wire, and wire netting, of iron or steel.
412	Iron or steel nuts, washers, rivets, and bolts, with or without threads; nut, bolt and hinge blanks; and T and strap hinges of all kinds, n.o.p.
414	Iron or steel cut nails and spikes (ordinary builders'); and railroad spikes.

SCHEDULE E—*Continued*

Numbers of the Canadian Tariff	Products
418............	Wire cloth, or woven wire of brass or copper.
Ex. 419............	Needles, of any material or kind.
420............	Buckles and clasps of iron, steel, brass or copper, of all kinds, n.o.p. (not being jewellery).
424............	Guns, rifles, including air guns and air rifles not being toys; muskets, cannons, pistols, revolvers, or other firearms; cartridge cases, cartridges, primers, percussion caps, wads, or other ammunition, n.o.p.; bayonets, swords, fencing foils and masks; gun or pistol covers or cases, game bags, loading tools and cartridge belts of any material.
426............	Knives and forks and all other cutlery, of steel, plated, or not, n.o.p.
428............	Iron or steel hollow-ware, plain black, or coated, n.o.p.; and nickel and aluminium kitchen or house hollow-ware, n.o.p.
437............	Safes, doors for safes and vaults; scales, balances, weighing beams, and strength testing machines of all kinds.
453............	Telephone and telegraph instruments, electric and galvanic batteries, electric motors, dynamos, generators, sockets, insulators of all kinds; electric apparatus, n.o.p.; boilers, n.o.p.; and all machinery composed wholly or in part of iron or steel, n.o.p.; and iron and steel castings, and iron or steel integral parts of all machinery specified in this item.
454............	Manufactures, articles or wares of iron or steel or of which iron and steel (or either) are the component materials of chief value, n.o.p.
494............	Manufactures of corkwood or cork bark, n.o.p., including stripes, shives, shells and washers of cork.
495............	Corks, manufactured from corkwood, over three-fourths of an inch in diameter measured at the larger end.
506............	Manufactures of wood, n.o.p.
521............	Gray cotton fabrics and fabrics of flax, unbleached, n.o.p.
522............	White cotton fabrics, and fabrics of flax, bleached, n.o.p.; tailors' hollands of linen and towelling of linen or cotton in the web, coloured or not.
525............	Stair linen, diaper, doylies, tray-cloths, sheets, quilts, counterpanes, towels, and pillow cases, of cotton or linen; uncoloured damask of linen or cotton in the piece, including uncoloured table cloths or napkins of linen or cotton.
527............	Jeans, sateens, and coutils, when imported by manufacturers of corsets and dress stays, for use exclusively in the manufacture of such articles in their own factories.
535............	Cotton sewing thread in hanks.
536............	Cotton or linen thread, n.o.p.; crochet and knitting cotton.
537............	Manufactures of cotton, hemp or flax or of which cotton, hemp or flax is the component material of chief value, n.o.p.
557............	Yarns, woollen and worsted, n.o.p.
558............	Yarns, composed wholly or in part of wool, worsted, the hair of the goat, or like animal, n.o.p., costing thirty cents per pound or over, when imported on the cop, cone or tube, or in the hank, by manufacturers of woollen goods for use exclusively in their own factories.
562............	Oiled silk, and oiled cloth, and tape or other textile, india-rubbered, flocked or coated, n.o.p.
564............	Felt, pressed, of all kinds, not filled or covered by or with any woven fabric.
565............	Blankets of any material.
566............	Flannels, plain, not fancy; fabrics of wool or of cotton and wool, commonly described and sold as lustres, mohair, alpaca and Italian linings.
568*a*...........	Socks and stockings of all kinds.
572............	Turkish or imitation Turkish or other floor rugs or carpets; and carpets, n.o.p.
579............	Sewing embroidery silk; silk twist, and silk floss.
580............	Black mourning crapes.

SCHEDULE E—*Continued*

Numbers of the Canadian Tariff	Products
Ex 581............	Velvets, velveteens, silk velvets and plush over twenty-four inches in width. Silk fabrics over twenty-six inches in width.
592............	Buggies, carriages, pleasure carts and vehicles, n.o.p.; tires of rubber for vehicles of all kinds, fitted or not; cutters, children's carriages and sleds, and finished parts of all articles in this item. Provided that for duty purposes the minimum value of an open buggy shall be forty dollars, and the minimum value of a covered buggy shall be fifty dollars.
597............	Pianofortes, organs and musical instruments of all kinds, n.o.p.; phonographs, graphophones, gramophones and finished parts thereof, including cylinders and records therefor; and mechanical piano and organ players.
598............	Brass band instruments; parts of pianofortes and parts of organs; and bagpipes.
604............	Dongola, cordovan, calf, sheep, lamb, kid or goat, kangaroo, alligator, and all leather, dressed, waxed, glazed or further finished than tanned, n.o.p.; harness leather, and chamois skin.
605............	Skins for morocco leather, tanned but not further manufactured; belting leather, of all kinds; tanners' scrap leather; leather not further finished than tanned, and skins, n.o.p.
623............	Musical instrument cases and fancy cases or boxes of all kinds, portfolios and fancy writing desks, satchels, reticules, card cases, purses, pocket-books, fly books and parts thereof.
624............	Bead ornaments, and ornaments of alabaster, spar, amber, terra cotta or composition; fans, dolls and toys of all kinds; statues and statuettes of any material.
628............	Braces or suspenders, and finished parts thereof.
629............	Umbrellas, parasols and sunshades of all kinds and materials.
647............	Jewellery of any material, for the adornment of the person, n.o.p.
648............	Precious stones and imitations thereof, not mounted or set; and pearls and imitations thereof, pierced, split, strung or not, but not set or mounted.
651............	Buttons of all kinds covered or not, n.o.p., including recognition buttons, and cuff or collar buttons.
652............	Combs for dress and toilet, including mane combs, of all kinds.
653............	Brushes of all kinds.
656............	Tobacco pipes of all kinds, pipe mounts, cigar and cigarette cases, cigar and cigarette holders, and cases for the same, smokers' sets and cases therefor; and tobacco pouches.
657............	Magic lanterns and slides therefor, philosophical, photographic, mathematical and optical instruments, n.o.p., cyclometers and podometers, and tape lines of any material.
658............	Frames not more than ten inches in width, clasps and fasteners, adapted for use in the manufacture of purses and chatelaine bags or reticules.
Ex 710............	Coverings, inside and outside, used in covering or holding goods imported therewith, shall be subject to the following provisions, viz: (*b*) Usual coverings containing goods subject to any ad valorem duty, when not included in the invoice value of the goods they contain.
711............	All goods not enumerated in this schedule as subject to any other rate of duty, and not otherwise declared free of duty, and not being goods the importation whereof is by law prohibited. Provided that duty shall not be deemed to be provided for by this item upon dutiable goods mentioned as "n.o.p." in any preceding tariff item. Provided further that when the component material of chief value in any non-enumerated article consists of dutiable material enumerated in this schedule as bearing a higher rate of duty than is specified in this tariff item, such non-enumerated article shall

SCHEDULE E—*Concluded*

Numbers of the Canadian Tariff	Products
	be subject to the highest duty which would be chargeable thereon if it were composed wholly of the component material thereof of chief value, such "component material of chief value" being that component material which shall exceed in value any other single component material in its condition as found in the article.

Note 1.—The numbers of the tariff items have reference to the present Canadian tariff.

Note 2.—Abbreviation: n.o.p. means "not otherwise provided for" elsewhere in the Canadian tariff.

Note 3.—The term "Ex" in the case of the number of an item means a part of the item to which the number refers.

Note 4.—When the term "Ex" is not used in the number of the item the whole item is meant.

SCHEDULE F

FRENCH PRODUCTS RECEIVING THE INTERMEDIATE TARIFF LESS A DISCOUNT OF FIFTEEN PER CENT ON THE AMOUNT OF THE DUTY.

Numbers of the Canadian Tariff	Products
523............	Fabrics of cotton or flax, printed, dyed or coloured, n.o.p.
563............	Women's and children's dress goods, coat linings, Italian cloths, alpacas, orleans, cashmeres, henriettas, serges, buntings, nun's cloth, bengalines, whip cords, twills, plains or jacquards of similar fabrics, composed wholly or in part of wool, worsted, the hair of the camel, alpaca, goat, or like animal, not exceeding in weight six ounces to the square yard, when imported in the gray or unfinished state for the purpose of being dyed or finished in Canada, under regulations prescribed by the Minister of Customs.
567............	Fabrics, manufactures, wearing apparel and ready-made clothing, composed wholly or in part of wool, worsted, the hair of the goat, or other like animal, n.o.p.; cloths, doeskins, cassimeres, tweeds, coatings, overcoatings and felt cloth, n.o.p.

Note 1.—The numbers of the tariff items have reference to the present Canadian tariff.

Note 2.—Abbreviation: n.o.p. means "not otherwise provided for" elsewhere in the Canadian tariff.

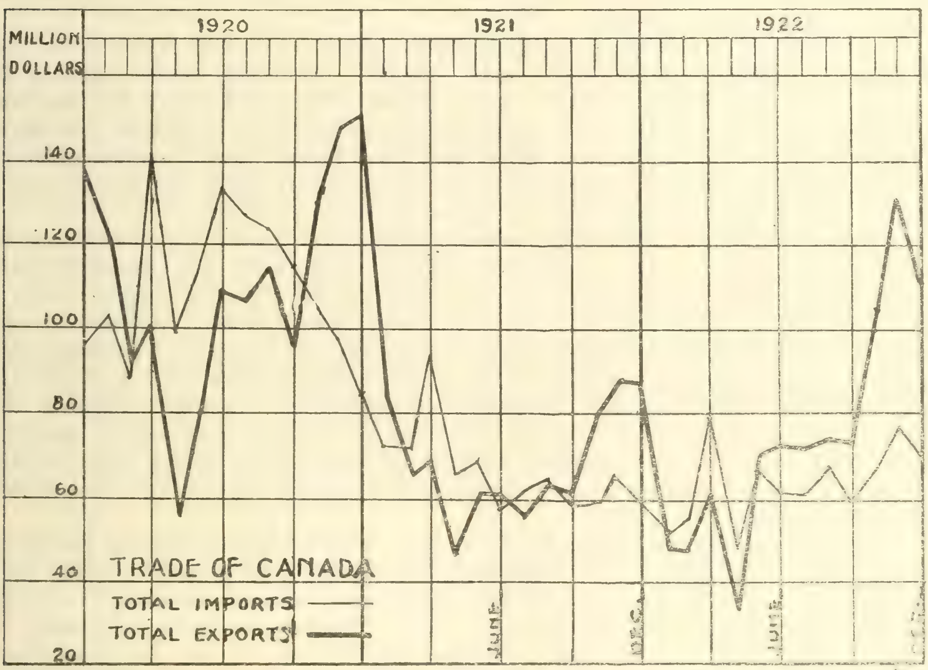
EXTENSION COURSE IN EXPORT TRADE

The Extension Course in Export Trade, which was announced to be held at l'Ecole des Hautes Etudes Commerciales, Montreal, on February 12, has been postponed for one week and will now begin on February 19, extending for a period of two weeks. The Course is divided into two parts, the first consisting of lectures, in French, by the professors of the Ecole des Hautes Etudes, and the second of lectures, in English, by officers of the Department of Trade and Commerce. These lectures will be accompanied by demonstrations, followed by discussions.

This course is the third of a series on Export Trade, the first of which was held at University of Toronto, and the second at McGill University.

Applications for the above course should be made to the Director of l'Ecole des Hautes Etudes Commerciales, 399 Avenue Viger, Montreal, not later than February 17.

EXPORT AND IMPORT TRADE OF CANADA BY MONTHS, DECEMBER, 1919, TO DECEMBER, 1922



The above graph reflects the improvement in Canada's balance of trade during 1922. In the nine months of the fiscal year ending with December, 1922, Canadian exports of domestic merchandise showed an increase of $144,121,903 over those of the corresponding period of 1921. Imports in the same period were higher by $14,534,977 and foreign merchandise exported increased in value by $128,939, bringing the increase in the grand total trade for the nine months to $158,785,819.

From an adverse balance of trade of $50,448,311 for the twelve months ending December, 1920, the trade of Canada showed a favourable balance of $17,215,798 for the same period in 1921, which was further increased to $152,-170,946 in 1922.

ACTIVITY IN THE UNITED STATES LUMBER INDUSTRY

Frederick H. Palmer, Assistant Trade Commissioner in the United States

New York City, January 26, 1923.—The unseasonable demand for lumber of all kinds during the last fortnight might be instanced as an evidence of the proportions building activity in the United States is expected to assume in 1923. With the exception of a period during the war, the orders placed for southern pine during the week ending January 20 were the largest on record, and the midwinter breaking of a record of over six years' standing, is an indication of the enormous potential demand for this lumber. The present activity is not restricted to demands for southern timber since orders received for timber from the west coast in the same week totalled 153 per cent of production.

Part of this demand is doubtless for replenishment purposes as well as for current requirements, a combination pointing towards a stock shortage. Some buyers ordinarily refrain from purchasing until the spring weather facilitates production, and as a matter of record the annual climax of lumber trade activity is normally in May. Realizing that the present state of affairs indicates higher prices at no distant date, these buyers are apparently making a concerted rush to obtain a portion at least of their spring needs before quotations advance, or deliveries become uncertain, and thus ensure participation in the building activities of the approaching season.

The effect of the present demand is intensified because it comes at a time of seasonal curtailment of output, and, generally speaking, manufacturers are not in a position to increase their rates of production sufficiently to take care of the heavier demand. For the week ending January 20, production was about 64,000,000 feet behind shipments which are some 76,000 behind orders, notwithstanding the fact that 372 mills produced nearly 203,000,000 feet or 29,000,000 more feet than 402 mills for the corresponding week of 1922.

Hardwoods share the general active demand for lumber, but short supplies are limiting business. It is asserted, however, that only the unusually mild winter has enabled producers to avoid a shortage of a severe nature, since it has been possible to keep up production without interruption. In these circumstances, and also as the supply is stated to be falling behind the demand, it is feared that the first interruption of output will result in a serious shortage, and already buyers are accepting shipments of half green lumber, choosing this material rather than incur the risk involved in seeking thoroughly seasoned stock. One phase of the situation, helpful to buyers and sellers alike, is that deliveries are facilitated by a fairly adequate car supply, which allows an uninterrupted movement.

Since the demand now exceeds production, sellers are naturally in control of the situation, but all things considered, buyers are not placed entirely at a disadvantage. Prices have not shown any great upward tendency as might naturally have been expected, and the bulk of business is being transacted at figures similar to those which prevailed two months ago. Prices are exceedingly firm, however, and a very little additional pressure might easily force them to higher levels.

CONDITIONS IN THE PAPER INDUSTRY OF GERMANY

The paper industry in Germany, according to trade journals, is restricted in its effect upon world trade. Timber is becoming scarcer as stocks are used for other purposes and for reparations payments, while imports are almost excluded by the present high and unstable rate of exchange. Nevertheless, the mills have a large supply of orders, both from domestic and foreign markets. Prices quoted in paper marks rise steadily, being now about 2,000 times the pre-war basis. Quotations to high-exchange countries are based on the dollar as a standard and, as a result have shown little change in recent months. There is much speculation on the almost certain increase in prices.

GERMAN TRADE IN FISH PRODUCTS

Trade Commissioner L. D. Wilgress

Hamburg, January 10, 1923.—Canadian exporters of certain lines of fish were commencing to secure a foothold in the German market when the war intervened. It may therefore be of interest to review the present conditions in the trade with Germany in those fish products which Canada can supply.

The fish trade is an old-established business at Hamburg, and before the war considerable quantities of herrings, salmon and other fish were imported not only for consumption in Germany, but also for distribution throughout Central Europe, Russia and Scandinavia.

CANNED SALMON

Many endeavours have been made to introduce canned salmon to the German market, but so far little success has attended these efforts. The chief obstacle has been the high rate of duty which prevented the popularization of this article as a cheap foodstuff for everyday use. Representations were made from time to time with a view to having the duty reduced by the Government, but other influences always proved too strong.

The present rate of duty on canned salmon imported into Germany is 75 marks per 100 kilogrammes (220 pounds). The duties are levied on a gold basis, a fixed ratio of paper to gold marks being determined at intervals. Thus at present 1,680 paper marks are held to be the equivalent for duty purposes of one gold mark. Hamburg firms state that this rate of duty prohibits the importation of canned salmon for consumption in Germany. The trade are considering the advisability of again making representations to the Government for a reduction in the duty and are encouraged by a similar action taken by importers of sardines, on which a decision is being awaited.

Shortly after the Armistice fairly large quantities of canned salmon appeared on the German market as a result of the disposal, at cheap prices, of surplus war stocks by the Allies. These have been consumed, and it would now be impossible, in view of the depreciated exchange, and the high rate of duty, to find a profitable sale in Germany for canned salmon imported from abroad. Firms in the trade state, however, that they would be prepared to handle small consignments on a commission basis. Sales would be made ex Free Port to buyers from Czecho-Slovakia, Austria, and other Central European countries or else to the suppliers of ships' stores. Inquiries are often being received from Czecho-Slovak and Austrian buyers who, being unable to purchase direct from producing countries, seek supplies ex Free Port Hamburg. This demand though limited would be steady and small consignments could in this way be liquidated.

MILD-CURED SALMON

The trade in mild-cured salmon between the United States and Germany was fairly considerable before the war, and Canadian firms were also beginning to share in the business. The mild-cured salmon is imported into Germany for smoking purposes, and in addition to consuming large quantities of smoked salmon, Germany used also to export this product to other countries. Hamburg firms also re-exported mild-cured salmon to Russia and other countries where the smoking of salmon was done on a large scale.

The shipment of mild-cured salmon from the Pacific Coast of North America to Germany commenced about the year 1896. The trade soon attained large dimensions, as many as 13,000 tierces being imported in one year. Since the war only a small amount of business has been done. The depreciated

exchange has made smoked salmon too dear an article for general consumption. During 1921 the whole import of mild-cured salmon amounted to only between 500 and 600 tierces. It is reported that still less was imported during 1922. Practically no mild-cured salmon has been imported from British Columbia since the war, the prices, it is said, being too dear as compared with California, Columbia River or Puget Sound. Sacramento Fall salmon is the most common variety now purchased, prices ranging from 16 cents a pound f.o.b. Pacific Coast up to 21 cents for the largest sides. Some Puget Sound was recently imported at 22 cents a pound, but it is said that the price made sales very difficult.

Only large sides of mild-cured salmon can be imported into Germany for smoking purposes, 89 sides per tierce of 825 pounds net being the smallest acceptable.

It is said that, owing to the high prices in marks, the consumption of smoked salmon in Germany has declined to small proportions. Smokers are endeavouring to find cheaper substitutes for salmon, and a smoked fish coloured to resemble salmon has appeared on the market. Some business is still being done in the export of smoked salmon from Germany to France, Switzerland, Czecho-Slovakia, and even to the United States, but until Germany and Russia are again able to consume something like pre-war quantities of smoked salmon, it is expected that the trade in mild-cured salmon with Hamburg will be restricted.

FROZEN SALMON

Considerable quantities of frozen salmon were also imported into Germany before the war from the Pacific Coast of North America. An import of over 2,000 tons a year of frozen salmon is said to have taken place. For reasons similar to those responsible for the decline in the trade in mild-cured salmon—viz., the depreciated exchange—the business in frozen salmon has also dropped off. Over a year ago one of the German firms received a consignment, but the price realized involved loss of money. A shipment of frozen silversides has recently been received, but the trade is sceptical as to the prospects of the fish being sold at a profit. It is evident that until more normal financial conditions prevail in Germany, frozen salmon will be too dear an article for ready sale, and no revival in this trade can be expected for some years.

HERRINGS

The herring trade is one of the oldest in Hamburg, and was considerable in the days of the Hanseatic League. The following market report, dated December 30, 1922, was supplied the writer by the firm R. Edminson Ltd., Hamburg, and gives a review of the present conditions in the herring trade with Germany:—

Supplies of herrings to our market are now becoming more like the figures of normal times, and the following have arrived during this year:—

Scotch, 115,514 whole barrels against 101,828 whole barrels in 1921; English, 33,805 whole barrels against 6,060 whole barrels in 1921; Norwegian, 166,694 whole barrels against 45,197 whole barrels in 1921.

Business up to the month of August was very satisfactory all round and would have continued so but for the great slump in the German mark. This latter brought the demand in Germany almost to a standstill, but we have nevertheless been able to clear out our stock at reasonable sterling rates, with the exception of a few parcels of Matjes held for speculative prices. Of Matjes, there are about 8,500 half barrels lying in cold stores here, which may be sufficient, although dealers, contrary to former years, hold no stocks whatever. Some parcels of Matjes are coming in from the States, both Alaskan and Scotch, the latter 1921 cure, and meet a ready sale at about 35 shillings per two half barrels net here for sound and tainted.

Scotch Eastcoast cure is practically sold out, but business in Yarmouth-Lowestoft herring has been very disappointing, as owing to the above reason our supply of this season's cure has not exceeded 2,000 whole barrels. The purchasing power of the German buyers has naturally decreased with the depreciation in the value of the mark. For instance, 100 whole barrels of Shetland Matties could be purchased in August for M. 700,000, whereas to-day a similar quantity would cost say M. 6,000,000. This is a state of affairs which must be kept in mind, but there is nevertheless a great necessity for herrings in this country which must be met in one way or other. Of course Scotch and English cure is preferred to any other kind, but under present conditions anything cheaper is in demand, and there is therefore a chance for winter cure if same can be delivered at a reasonable figure.

The German companies have cured a good quantity this last season, a fair proportion of which were herrings landed fresh by the trawlers and land-cured.

It will be noted from the foregoing figures that arrivals of Norwegian herrings have been fairly heavy, attributable to the cheapness of this class of cure. This fishing should commence again soon, but it is expected that the Soviet Government will again take the bulk of these herrings. It is gratifying to the whole trade that Russia is once more in the market for all kinds of herrings. A clearer political atmosphere would bring more confidence into continental business, and we trust the coming year will see this accomplished.

FISH MEAL

The demand in Germany for fish meal appears to present an opening for the disposal of fish waste, which in Canada is often unutilized. Prior to the war Germany used to import 100,000 tons annually of fish meal, which was chiefly used for feeding pigs, and to a lesser degree cattle and poultry. At the present time it is estimated that the consumption of fish meal is only 5 per cent of normal owing to the high cost in marks to the farmers of imported meal. There is no doubt that when conditions again become stable this trade will revive, and the question of the disposal of fish waste in this way is one which deserves careful consideration in Canada.

The heads, bones and tails of the fish are ground to a fine powder, as much as possible of the oil extracted, and then dried. The meal is shipped in good jute bags. The Norwegians have a process of extracting the oil by means of hydraulic presses which is also used in the United States.

Fish meal must not contain more than 10 per cent oil or 10 per cent salt. The best meal is that with only 3 per cent of oil. The meal must be dried to not more than 15 per cent moisture. The Norwegians dry their meal to as much as 8 per cent moisture. Cod meal fetches the best price in Germany. Ground and well-dried goods, 3 to 5 per cent oil and salt, English cod meal, sell at £12 a ton c.i.f. Hamburg. Manhaden waste is being offered by American firms at $60 a ton f.a.s. Baltimore, but this is stated to be too dear. Herring meal brings about £10 a ton c.i.f. Hamburg.

The chemical content of the meal is the most important consideration. If the fish meal given to pigs contains too much oil or fat, the flesh is apt to be tainted. Most of the fish meal imported into Germany comes from Norway and Great Britain, while manhaden meal is shipped from the eastern United States. Owing to increasing use of fish meal in Great Britain, available supplies are less than before the war and British shippers find that they can realize better prices at home. When Germany is again able to take normal quantities there should be a keen demand for available supplies, and it might be well for Canadians to go into this matter further. Hamburg importers have offered to test for the writer any samples of fish meal which may be sent over from Canada so as to judge the suitability of the meal for the German trade.

TRADING POSSIBILITIES IN HOLLAND FOR CANADIAN PRODUCTS

Trade Commissioner Norman D. Johnston

Canned Fish

[This is the fifth of a series of reports by Mr. Johnston on Trading Possibilities in Holland for Canadian Products. The first, on Grain and Feeding Stuffs, was published in No. 982; the second, on the Demand for Flour, in No. 984; the third, on Dried and Evaporated Apples, in No. 991; and the fourth, on Canned and Preserved Fruits and Vegetables, in the last issue (No. 992).]

Rotterdam, January 17, 1923.—The Netherlands trade returns do not show the specific imports of the various kinds of canned fish, with the exception of herrings. The following table will, however, indicate the quantity and value of fish, shell-fish and testaceans imported in 1921 in tins, bottles and similar small packing into Holland:—

Herring, Marinated

Imports	Quantity Kg.	Value Guilders
Total	9,693	4,476
From Germany	7,804	2,690

Other Fish, Shell-fish and Testaceans

Imports	Quantity Kg.	Value Guilders
Total	1,700,533	1,701,644
From Germany	25,932	24,463
Belgium	299.517	227.725
Great Britain	296.683	344.284
France	267.599	383.111
United States	462.501	386.900
Norway	105,869	105.770
Italy	7,146	11.420
Portugal	178.484	153,763
Spain	32.362	26,376
Argentina	12,721	20,791

CANADIAN PRODUCTS EXPORTED THROUGH THE UNITED STATES AND GREAT BRITAIN

It will therefore be seen that, outside of canned herring, the United States was, as indicated by the foregoing figures, the largest supplier. It should therefore be possible for Canada to capture part of this trade. Canadian packers already do some business in canned salmon, canned lobster and such lines, and probably some of the exports from the United States are Canadian canned fish products, but her direct trade is not sufficient to be shown in the import tables. Belgium, Great Britain and France were next in order of importance in point of view of the quantity supplied, and without a doubt a part of the British exports contained good quantities of Canadian canned fish, because one of the largest businesses in Canadian canned salmon and lobster in Holland is done by a Liverpool firm with canneries in Canada and who import great quantities from the Dominion. These would, however, be mostly included in the British exports to the Netherlands. Portugal and Norway also supplied fairly good quantities of their well-known brands of canned fish to Holland.

LAST YEAR'S TRADE

With regard to the first eleven months of 1922, the preliminary statistics show that about 19,000 kilogrammes of marinated herring, with a value of about 6,000 florins, were imported and approximately 1,174,000 kilogrammes valued at about 1,109,000 florins of other canned fish, shell-fish and testaceans entered Holland from abroad. Of the latter category, the United States supplied about

389,000 kilogrammes valued at 300,000 florins, Belgium 210,000 kilogrammes with a value of 142,000 florins, Great Britain 161,000 kilogrammes valued at 219,000 florins, France 135,000 kilogrammes with a value of 200,000 florins, Portugal 111,000 kilogrammes valued at 84,000 florins, and Norway about 107,000 kilogrammes with a value of 101,000 florins. Here also the United States and British figures undoubtedly included a good quantity of Canadian canned fish, but there would appear to be plenty of room for direct business from Canada to Holland.

Canned Salmon

The trade in canned salmon cannot be said to be of large proportions in Holland. Fresh fish is plentiful, and canned salmon is considered a luxury. Quite a good business is, however, done in normal times which is well worthy of consideration, and while trade at the moment is slow, the general opinion is that Dutch people are eating more canned goods than used to be the case.

CHANGE IN SALMON TRADE

The salmon trade in the Netherlands has shown a considerable change in recent years. Previously canned salmon was eaten largely by the better class people, and it was very difficult to sell anything but high-class red salmon. Now, however, the money is in different hands, and people will not pay the high prices required for red salmon so that it is difficult to sell it, and the main demand is for medium red and pink salmon. The opinion has, however, been expressed in well-informed quarters that when trading conditions become more normal in Holland, the trade will gradually work round again to the red variety of salmon such as red springs and sockeyes. It will, however, likely be very gradual.

VARIETIES OF SALMON AND STYLE OF TIN IN DEMAND

At present Alaska medium reds are popular, while pinks find an equal if not larger sale. About half the trade is in 1-lb. tall tins, and the other half is divided between half-pound tall and flat tins. The half-pound flat tins meet, however, with much more approval than the half-pound tall tins in Holland, as there is an impression, on account of the shape, that they contain more than the tall tins, and most of the exporters are adopting the flat shape for the half-pound tins when exported to the Netherlands.

CANADIAN CANNERS PROGRESSIVE

In this regard Canadian salmon canners have been very progressive, and their pink salmon in flat half-pound tins has sold much better, with the result that the writer was informed, when visiting the different firms in the trade, by one of the agents of a United States salmon packer, that they had written to the United States firm asking them to adopt the flat half-pound tins similar to that used by certain Canadian salmon canners. It will therefore be best for Canadians in shipping salmon to Holland to use the flat half-pound tin, while in the case of the one pound, the tall tin is mostly in demand. One-pound tins are generally packed 48 to a case, while the half-pound tins are sometimes packed 96 and sometimes 48 to the case.

Canned Lobster

The canned lobster trade does not reach large amounts in Holland, and the general impression among Dutch importers is that the trade in this commodity is very risky, the usual phrase used being "too dangerous". They feel that the various packs differ so considerably in quality, and such care has to be taken

by the canners in just giving the lobster the right amount of cooking and wrapping, that unless the pack is well-known the hazards are too great, as not sufficient care in preparation, too much or too little cooking, or not enough care in wrapping, will cause the lobster to go black very quickly, and the general impression is that even the best of canned lobster will go black around the edges if kept for any length of time.

CANADIAN LOBSTER BOUGHT THROUGH ENGLISH HOUSES

The importers are therefore very diffident about contracting far ahead or buying canned lobster in large quantities, as the article is considered a luxury and the trade is fairly slow. Much of the canned lobster, a part of which is Canadian, is imported through the well-known English firms who can supply smaller quantities at a time and quickly at quite reasonable prices, as the English houses buy in large quantities for the United Kingdom market and are therefore able to purchase at the lowest possible prices.

CARE IN PREPARATION AND SIZE OF TINS

Providing, however, that a Canadian lobster canner will give close attention to preparation, and especially just the correct degree of cooking, and will see that the fish is kept away from the tin by a paper wrapper, it should be possible to gradually develop a direct business in canned lobster from Canada to Holland.

The sizes sold are $\frac{1}{4}$-pound, $\frac{1}{2}$-pound, and 1-pound tins, the preference being for the smaller sizes. Practically only flat tins are desired in the Dutch market.

LABELS

Most of the exporters of canned lobster to Holland use their own labels, as it is felt by the Dutch people that there is then a greater guarantee of quality. It is important that Canadians should use their own labels, because importers are so chary about dealing in canned lobster that the brand is very important. They therefore stick to the well-known brands, and while it may be slow at first in introducing new brands, it will be much easier in the future to sell that brand once the quality and name have become known. On the other hand, if the Dutch agent's or importer's labels are used it is their brand name which becomes known and not that of the canner, which creates an awkward situation if circumstances should necessitate a change of representative in the future. This is important where the quality of a known brand is of such consideration.

Sardines or Similar Fish

There is a fairly good sale in Holland for canned sardines, brisling, pilchards or similar small fish, and the Dutch firms do a very large business in these products in Germany and Middle Europe. One Dutch agency firm alone recently mentioned to the writer, and showed a record of it in their books, that they had sold over 40,000 cases of Portuguese sardines last year in Holland and the Central European countries.

SOURCES OF SUPPLY

France, Portugal, Spain, Italy, and Norway do most of the business in sardines, but recently Canadian so-called sardines—brisling, pilchards, or whatever name such class of fish is given—have been offered at very low prices, and while the quality is stated not to be equal to the other lines on the market, there should be a splendid possibility of doing a large business if Canadian importers

can undersell competitors, as price is the greatest consideration at present in Europe, on account of the unstable and depressed monetary, business, and trading conditions in many countries.

French sardines are the most popular in Holland, while Portuguese, Spanish, and Italian sardines are also held in high favour. Norwegian canned brisling or so-called sardines are not thought as highly of as the brands from the other previously mentioned sources of supply, but they nevertheless meet with a good sale.

PACKING

The Portuguese, Spanish, and Italian canners adopt a style of packing, tins, and labels very similar to the French, and with which Canadian canners are probably familiar.

The usual sized tins are sold, the smaller sizes having the largest sale. Orders for sardines would run in about the proportion of 100 cases of $\frac{1}{4}$-kg. size and 25 cases of $\frac{1}{8}$-size tins, while $\frac{1}{2}$-size tins are seldom ordered, and if so only in small quantities. The $\frac{1}{4}$-size tin contains from eight to twelve fish, and the oil and fish weigh 200 grammes net, while the $\frac{1}{8}$-size tin comprises 100 grammes net and the $\frac{1}{2}$-size 400 grammes net weight of fish and oil. The $\frac{1}{8}$-size tin sold is mostly of Norwegian brisling and averages about four fish.

Canadians endeavouring to develop this market should expend their greatest efforts on tins of the above-mentioned sizes.

DUTY

The duty on canned fish of all kinds on importation into Holland is 25 guilders per 100 kilogrammes.

REPRESENTATION

In order to develop a good business in the various canned fish lines, it will be best to give a Dutch firm the sole representation. With regard to the type of firm best suited for this purpose, opinion differs in the trade. As Holland is a small country, some think that it is best to deal direct with the large wholesale importers, as there is a preference shown by such firms to buy direct, and they are more likely to specially push the sale of those products in order to retain the sole representation, and they are certain that they are the only wholesale firm handling the line, while if they buy from agents they know that similar goods are being offered to other wholesalers. On the other hand, they do buy large quantities from the agents from whom they can get the products required cheapest, and if a commission agent is appointed he can approach all the leading wholesale importers and keep the lines constantly before them.

On account of the small size of Holland, many of the wholesalers must be approaching the same retailers, in which case the appointment of one of the large wholesalers as sole representative who will buy on his own account and energetically introduce the article has much to be said for it, as it does away with agents' commissions. There is, however, a considerable argument in favour of the appointment of a commission agent who is reliable and well established in the trade, as he can keep the Canadian firm well posted as to the market, has a knowledge of the financial standing of the various firms, and can specially push the sale of the article where it is likely to sell best and get the best price. Where the agency firm has also extensive connections in other parts of Europe which can be taken into consideration in selling where the best price can be obtained, the selection of such a representative has advantages. It really depends upon the type and quality of the canned fish which it is desired to sell and the quantity which the Canadian firm is likely to have to offer for this market.

COMMISSIONS, QUOTATIONS, AND TERMS

If a commission agent is appointed, the usual commission for canned salmon and canned lobster is 2 per cent or 2½ per cent, according to the arrangements, and whether cabling expenses are chargeable to the agent's or seller's account. On sardines the rate of commission varies, but in certain instances 5 per cent is usual.

Quotations should be sent c.i.f. Dutch ports in Dutch currency if possible, but Canadian currency is not a deterrent to trade.

The terms should not be less than cash against documents Holland, as these terms are generally given, and often thirty days' sight draft, and in getting into this business it will be necessary to meet competition. Importers will not establish a letter of credit in Canada or New York, and there is no use trying to do a business on such a basis; it would only be a waste of time.

CONSIGNMENTS

After it has become certain that the agent can be trusted, it may, under certain circumstances, in order to better introduce the brand and let the quality be known, be advisable to send the goods on consignment, but great care should be taken and every investigation made before such a business is attempted as it is a very difficult type of trade to check, and there is a great temptation to the agents to buy on their own account if the market is good and to do otherwise when it is bad.

It will be best for Canadian fish packers who are interested in developing a trade in Holland to communicate with the Canadian Trade Commissioner, who is acquainted with practically all the principal firms in this trade, putting forward their desires, sending samples, prices, terms, and other details, when they will be put into touch with the most likely firms for the sale of their particular line with a view to making permanent connections for a steady and growing trade in the Netherlands.

ECONOMIC CONDITIONS IN HOLLAND AS COMPARED WITH 1914

Trade Commissioner Norman D. Johnston

Rotterdam, January 22, 1923.—At the commencement of the year it will probably be of interest to Canadians to have a brief survey of the present economic condition in Holland in relation to her standing before the war. Many of the Dutch newspapers, in entering into comparisons of the national trade position and production capacity of Holland, support the theory that the present condition of affairs is worse than that previous to hostilities, and that the losses sustained in the past few years have been so heavy that on balance the sum total of the national wealth is less than when the war began. It is nevertheless likely that the interpretation of events is unduly influenced by the depressing effect of certain comparatively recent troubles brought about by the slump.

Holland has undoubtedly suffered large losses in respect of her holdings of marks and kronen, as well as Russian, German, Austrian, and other investments, which are estimated in regard to German marks alone to exceed one milliard, and have even been mentioned as being as high as three milliards. The total purchase of marks, however, cannot be taken as a basis for loss calculation as a large proportion of the total must have been employed for purchases in Germany, and also the big mark purchases were mostly effected after marks had reached a relatively low level.

Expenses incurred in maintaining Dutch neutrality and other outlays directly attributable to the war, representing a total of 2,275 million fl., are

also mentioned as a loss, but in this regard a large proportion of this amount was met by taxing war profits and only part of such profits were taken, so that the remainder was left in private hands. A substantial part of this sum was also used in the community in such a way as to result in a permanent addition to the sum total of the resources of Holland as a whole.

The Dutch consolidated debt on January 1, 1914, amounted to 1,148,-380,000 fl. as compared with 2,745,187,000 fl. on January 1, 1923. In addition there was a floating national debt at the end of 1922 amounting to 294,495,008 fl. With regard to the latter, the Netherlands Government have decided to consolidate these debts by means of a loan which, in the words of the Government, will mark the end of the period of big Government loans for the Netherlands.

On the other side of the picture might be mentioned the following improvements or increases, undoubtedly accessions to the national wealth of Holland, which although not so much felt in depressed times, will become more evident when conditions become more normal:—

(1) Possibilities for Dutch trade have been opened up during and since the war.

(2) The industrialization of Holland has taken great strides, among which might be mentioned the creation and expansion of the margarine industry, the manufacture of incandescent lamps, the extension of the iron and steel industries, the creation of Dutch smelting furnaces, shipbuilding on up-to-date lines, the development of Holland's own chemical industry, and the extension of the manufacture of artificial silk, etc.

(3) On the 1st of July, 1914, the merchant fleet of Holland numbered 709 ships with a total capacity of 1,472,000 tons, while the situation on the 1st of July, 1922, was 1,100 ships with a total capacity of 2,617,000 tons, or an increase since 1914 of 1,145,000 tons, equal approximately to the combined marine of Denmark and Belgium in 1914. The present fleet is also much more modernized.

(4) Dutch holdings and Dutch influence in foreign properties, real estate, and participations of various kinds have greatly grown.

(5) The rubber industry of the Netherlands East Indies is practically a child of the war, having only appreciably developed in that period. The export of rubber from the Dutch East Indies in 1914 totalled 10,286 tons, while in 1920 the figure was 90,291 tons. While many of the rubber companies have since suffered difficult times, nevertheless the new plantations are a potential source of income.

(6) Foreign capital which was originally transferred to Holland as a temporary measure is now gradually seeking permanent investment in the Netherlands. In any case the foreign funds tend to make money rates easier and thereby provide a basis for industrial activity.

(7) At the end of March, 1914, the note circulation was 297,894,000 fl., with a gold reserve of 159,968,000 fl., while on the same day of 1922 the gold reserve was 605,953,000 fl. and the notes in circulation amounted to 959,631,-000 fl. The last monthly return for 1922 shows a note circulation of 974,-100,000 fl, covered by 581,100,000 fl. gold and 590,800,000 fl. metal (gold and silver). The increase in gold is a further asset.

The wholesale trade index numbers (taking the period 1901-10 as 100), which stood at 114 in 1913 for 53 articles and 113 for food supplies, stood at 180 and 172 respectively in November, 1922, as compared with 178 and 166 and 174 and 162 in October and September respectively.

The stock exchange index figures showed an increase in December of 2·64 per cent., the principal rise being in miscellaneous industrial shares, while bank shares slightly decreased.

IMPORTS AND EXPORTS

The Netherlands imports for the first eleven months of 1922, ending November, amounted to 1,863,836,045 fl. and the exports to 1,121,005,972 fl., making an excess of imports of 742,830,433 fl. These figures are considerably less than for the same period of 1921, being lower by over 196 million fl. for imports and 151½ million fl. for exports, but this was due to the drop in prices, for considering quantity, the total trade during the eleven months of 1922 reached the amount of 24,073,593 tons compared with 20,836,691 tons in the same period of 1921 and 22,932,412 tons for the whole of 1921 and 18,025,125 tons for all of 1920.

In conclusion it may therefore be said that, taking into account the economic condition of most European countries, Holland is in quite a strong position, as evidenced by the fact that the guilder has now returned to gold parity with the United States dollar, and that Dutch business interests have offered pretty successful resistance to the heavy competition experienced from foreign countries, notwithstanding the big sacrifices that have had to be made in certain branches of industry.

RADIO APPARATUS IN GREAT BRITAIN

Trade Commissioner G. B. Johnson

Glasgow, January 8, 1923.—As several Canadian companies have recently been inquiring about the opportunities of doing business in Great Britain in radio receiving sets and equipment generally, it will be of value to record briefly the present position in this country regarding broadcasting and the market for the equipment.

Unlike the position in the United States and Canada, the British Government, as represented by the Postmaster-General, has retained control. Its policy is to give licenses for broadcasting matter of an interesting nature, including music, from a limited number of stations throughout the country, five in England and one in Scotland. The Postmaster-General has accordingly been in negotiation for some time with wireless manufacturing concerns as to the conditions upon which such licenses should be issued.

It is important, in the interests of the public who purchase receiving sets, that the service should be efficient and that suitable programmes should be maintained regularly for some time at least. This will obviously involve the owners of the broadcasting stations in heavy expenditure, the return for which must be sought in the profits on the sale of receiving sets.

In the course of the negotiations the manufacturers represented that, in order to ensure that the capital should be forthcoming, it would be necessary that they should be secured, at least for a limited period, from competition from sources which did not contribute to the cost of the broadcasting scheme. They proposed to form a broadcasting company or companies to provide and work the broadcasting stations, and the Postmaster-General has intimated that, for a limited period, he will confine licenses for broadcast reception to types of apparatus submitted for his approval by members of the broadcasting company or companies provided that all bona fine manufacturers of wireless apparatus in this country are admitted to membership of any such company, on fair and reasonable terms. He has also intimated that he will assent to a condition that British-made sets only shall be sold by the members of the broadcasting company or companies for a period of two years, after which this condition will be subject to reconsideration. It will rest with the company or companies to determine to what extent the conditions in regard to non-British (imported) apparatus shall apply to component parts of receiving sets.

It will thus be seen that complete receiving sets manufactured in Canada will not be permitted to be imported at the present time, as " British-made " in this connection refers to apparatus manufactured in Great Britain only.

GREATER ACTIVITY IN GRASS SEEDS IN THE UNITED KINGDOM

Trade Commissioner Harrison Watson

London, January 26, 1923.—After a prolonged period of inactivity, there is a considerable revival in the demand in the United Kingdom for grass seeds of all kinds. The reason is that large tracts of land which were converted to the cultivation of wheat and other cereals during the war are reverting to pasture, and resulting from the present depressed condition of the agricultural industry, it seems probable that the movement will become even more extended.

The extraordinary high prices which have ruled since the war have been a great deterrent to business, and this position has been partly due to the process of changing sources of supply which had to be faced. While certain quantities of various kinds of grass seeds have still been coming in from Central Europe, the almost complete dependence of this country upon this source of supply has ceased. Upon the other hand, three successive years of crop failure in Australia and New Zealand have rendered the period of change still more difficult.

It will be known that Canada has for some time past supplied considerable quantities of alsyke to this country, although the business has been greatly reduced until recently, and as attempts have been made to establish a similar outlet for red clover, timothy, and other varieties, prospects for development in these directions have now become more favourable.

Price, however, remains a distinct obstacle, and from the following list published in the London *Times*, comparing to-day's quotations of the chief grass and farm seeds with pre-war prices, it will be observed that the present figures in many cases are triple those current before the war, and in some cases higher still. There is evidently still ample room for the reductions which would give a further impetus to trade:—

	Current Prices Shillings Per Cwt.	Pre-war Prices Shillings Per Cwt.
English red clover seed (special)	160s.	65s.
" " " " (average)	140s.	50s.
French red clover seed (special)	160s.	75s.
Chilean red clover seed (cleaned)	150s.	75s.
" " " " (as imported)	125s.	65s.
English white clover (special)	280s.	115s.
" " " (average)	250s.	95s.
Wild white clover seed (average)	1,500s.	336s.
English cowgrass (average)	240s.	80s.
English alsyke (average)	90s.	50s.
American alsyke clover seed (average)	90s.	90s.
English suckling clover seed (average)	150s.	50s.
English trefoil seed (average)	70s.	30s.
English ribgrass (average)	14s.	12s.
English sainfoin seed milled (average)	80s.	40s.
American timothy seed (good)	45s.	30s.
French Lucerne seed (good)	90s.	70s.
Rye grasses (best Belfast)	32s.	8s.
Rye grasses (French Italian)	36s.	9s.
Fescues: meadow	280s.	125s.
Fescues: red	240s.	70s.
Meadow grass, smooth	240s.	60s.
Tall oat grasses	300s.	55s.
Tailed grasses: foxtail	250s.	125s.
Tailed grasses: dogstail	200s.	70s.
Cocksfoot, Danish	60s.	60s.
Buckwheat, French	12s.	8s.
Broom, English	336s.	168s.
Gorse	600s.	448s.
Sunflower, Rhodesian	56s.	112s.

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MECHANICAL RUBBER GOODS IN THE MANCHESTER DISTRICT: SUPPLY AND DEMAND

Trade Commissioner J. E. Ray

Manchester January 15, 1923.—An attempt has been made by the writer this week to ascertain the sources of supply of, and the demand for, mechanical rubber goods in this district. It should be stated at the outset that in or near Manchester there are more than one hundred factories engaged in the production of various kinds of rubber goods, so that Canadian manufacturers desirous of obtaining a footing will at once realize the extent of the competition to be encountered. Moreover, during the last six months the rubber goods manufacturers have been making a strenuous effort not only to procure the bulk of the domestic trade, but also to increase their exports to foreign countries and the Dominions. A good deal of new machinery, some of which is patented, has been installed for the purpose of reducing the costs of production.

Articles manufactured by two or three huge plants in Manchester, with world-wide connections, include tires for all sorts of vehicles, hose, belting, valves, washers, insertions, packers; rainproof garments; bed and hospital sheetings; teats, tubing, hotwater bottles, water beds and surgical and druggists' sundries; mats, pouches, balls, toys, squeekers, balloons, boots and shoes, gloves, etc.

It is all a question of ability to compete as to whether or not Canadian manufacturers can procure a market.

Canadians were transacting quite an encouraging volume of business in many lines in pre-war days, and a certain amount is being done to-day in overshoes, Wellingtons, hip-boots, and motor tires. The former business resulted from the establishment of an independent organization in London with agents in the provinces, and any Canadian manufacturer desirous of obtaining a footing in Great Britain could not hope for success without adopting similar methods.

There exists an organization in Manchester known as the India-rubber Manufacturers' Association, Limited, the membership of which is large and influential. Further, the Rubber Growers' Association is contemplating a publicity campaign having as its object the enlargement of the market for rubber manufactures. The association is prepared to contribute £12,500 towards a joint fund, conditionally that manufacturers and distributors of rubber goods will contribute a similar amount, to be spent solely on this "Use More Rubber" propaganda.

Unfortunately there are very few rubber goods merchants in Manchester, and such agents as are in being are invariably sole agents for certain British manufacturers; consequently the nature of their engagements precludes them from accepting the representation of firms whose goods would of necessity enter into competition with those of their principals.

HOSE

It is learned that large supplies of hose are imported from the United States, and it is with the manufacturers of that country that Canadian producers will have to compete, so far as external competitors are concerned. Apparently the Americans have an advantage over the British makers in that they manufacture hose 500 feet in length, while 60 feet is the usual length produced in Great Britain. The American length is convenient for cutting, whereas a length of 100 feet of British hose would necessitate a joining.

INSERTION RUBBER

The Americans are also very successful with insertion rubber, which they land in Manchester now at 9d. per pound, whereas the British makers' price is from 10d. to 10½d. The Germans are also placing a similar manufacture of rubber on the British market.

A Manchester firm whose name and address are on file at the Department of Trade and Commerce, Ottawa, will be open in a few weeks' time to consider quotations on hose and insertion rubber, but at present they are fairly well stocked.

RUBBER TIRES

In 1922 there were imported by Great Britain 3,412,873 tires and tubes valued at £4,241,847, the greater part of which came from the United States. There can be no doubt that during the war the American manufacturers secured sound footing in the British market, and it has been impossible for the home manufacturers to produce on a basis sufficiently effective to defeat their competitors. While there is a duty of 33⅓ per cent on automobiles, tires are permitted free entry, and the British manufacturers of the latter are now suggesting that the duty be extended to tires also, so that employment may be given to British workmen, and also in order that the industry might be given an opportunity to regain the status at home and abroad which it enjoyed before the factories were all diverted to war work.

It is believed that very heavy stocks of American tires and tubes are held in the United Kingdom at the present time. Apparently mass production and cheaper working costs are responsible for the success of the American manufacturers in a country that was the originator of the pneumatic tire and the pioneer of the industry associated therewith.

Some Canadian manufacturers are also placing their tires in this district. An increase of their sales will depend upon the character of their distributing agencies. United States tires are always on hand at repairing and "filling up" depots, and no effort is spared to give the depots handling them every encouragement to push the sales.

GOLF SHOES

There may be an opening in this district for studded rubber golf shoes which are now retailing at from 8s. 6d. to 12s. 6d. a pair. They are very similar to overshoes with the addition of two small crossing straps to secure them to the shoes or boots.

HOT-WATER BOTTLES

Hot-water bottles of the usual standard sizes are imported from the United States, but the British manufacturers are procuring more and more of the business offering. During the last few months quite a number of the Jewish concerns in Manchester have taken up the manufacture of these bottles, and they are cutting prices very fine. They, as well as other manufacturers, have a distinct advantage over external competitors, in that they are continually calling upon buyers who naturally, other things being equal, place their orders with the men who are regular callers. Further, as a few buyers have explained to the writer, by having manufacturers close at hand, it is possible to send in small orders and have them executed in a few hours. This procedure obviates the necessity for carrying large stocks of a commodity that is liable to depreciate if kept long on hand.

The retail prices of bottles have fallen considerably, excellent qualities being on offer at from 4s. 6d. to 8s. 6d. each retail, according to size.

SURGICAL AND DRUGGISTS' RUBBER GOODS

Manchester is not a centre for the direct importation of surgical rubber goods, and such commodities as are handled by retail druggists. The direct importers are mainly located in London. It is learned that small quantities arrive from the United States, especially syringes, soothers and gloves, stocks being held in this country by the distributing organizations of the leading American manufacturers.

At the same time the United States makers are not doing as much business as they used to do some years ago. The managing director of the largest mutiple shop organization in the United Kingdom informs the writer that his company is buying a few bathing caps from the United States, but nothing else. He states that the British rubber sundries of domestic manufacture seem to be more satisfactory in quality, and equally satisfactory, if not more so, in price.

It would seem that Canadian makers can hope for little success in these lines, unless they have their own selling organization on the spot, or are represented by some well-known house having its own travellers calling regularly upon buyers.

The Germans have been sending fair quantities of the aforementioned goods during the last three years.

The manufacturers of the United States have been very successful with a rubber " film " glove which retails at 1s. 3d., the same being quite popular with housewives. The British makers produce a glove for domestic usage, but the price is nearly twice as much as that of the American glove. The quality of the former is superior, but the price of the latter appeals to the average consumer.

FURS AND SKINS INQUIRED FOR IN THE NORTH OF ENGLAND

Trade Commissioner J. E. Ray

Manchester, January 25, 1923.—There exists a very big market in the North of England and in other parts of Great Britain for skins and furs used for glove tops, backs and linings, as well as for collars and trimmings of ladies' coats, etc.

The glove makers use enormous quantities of rabbit skins, which are dyed different shades, and these constitute a big proportion of their requirements. They also use, to a more limited extent, otter, seal, squirrel, opossum, nutria, musquash, etc., and quite an important business is done in them.

In the ordinary way, furs used by the glove makers and others are bought at the skin markets in London, but it is maintained that direct sales could be made through a live representative on the spot who would be calling regularly upon the users.

The full skins are required made up in one-dozen parcels, ready dressed.

Fur exporters interested should refer to the Trade Inquiries published in this issue (page 259).

The inquirer states that he would have to receive a representative skin of each animal with prices laid down in Manchester, for 25, 50, or 100 dozen skins, together with time of delivery, before orders could be expected.

EXTENT OF IMPORTS

The imports of rabbit skins, dressed, numbered 4,134,215 in 1920 (latest figures obtainable), valued at over $2,500,000, the chief countries of origin being Belgium and Germany. Less than 30,000 skins came from British Possessions.

The number of skins and furs "Unenumerated" imported during the same year was 4,642,883, valued at approximately $13,250,000. The chief countries of origin were China, Germany, and the United States of America. The imports from British Possessions numbered 207,648 skins.

In 1913 the number brought in was 8,719,000 skins, of which quantity Germany supplied 5,400,947. It will thus be seen that the purchases from that source in 1920 were over ten times smaller than they were before the war.

The above figures do not, of course, include what may be termed domestic animals' skins, such as cow, sheep, goat, etc., utilized for purposes alien to those under discussion.

TRADE FACILITIES ACT OF GREAT BRITAIN

Mr. Harrison Watson, Canadian Trade Commissioner in London, has transmitted, under date January 22, 1923, the following explanatory statement and questionnaire issued by the Trade Facilities Act Advisory Committee to applicants for guarantees under that Act. On the advice of this committee the Treasury may guarantee the principal and interest of loans to be raised for the purpose of carrying out capital undertakings (constructional work, etc.), in any country; provided that the proceeds of the loan are applied in such a way as to reduce unemployment in the United Kingdom.

1. In accordance with the Trade Facilities Acts, 1921 and 1922, the Treasury is empowered, on the advice of an Advisory Committee operating at this address, to guarantee the principal and interest of any loan proposed to be raised by any Government, any Public Authority or any corporation or other body of persons for the purpose of carrying out capital undertakings.

The attention of applicants is particularly drawn to the following:—

(*a*)*The treasury can only guarantee loans—they have no power to *make* a loan of any kind. The advantage of the guarantee is that with the aid of the Government credit so given the applicant should be enabled to obtain money on better terms than he otherwise would be able to do. The committee and the treasury indicate the quarter in which the loan is to be raised.

(*b*) The treasury have no power to guarantee a loan which is to be used in whole or in part for the provision of working capital. The whole of the guaranteed loan must be used solely for the purpose of carrying out works of a capital nature.

(*c*) The treasury have no power to give a guarantee in respect of any loan which will be used wholly or in part for the purpose of extinguishing existing liabilities or commitments.

(*d*) The treasury have no power to guarantee ordinary or preference shares.

2. Applicants should supply information on the following points:—

A.—General particulars as to the total amount and purpose of the proposed loan, its term, and the suggested method of repayment.

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*Local authorities and statutory bodies not trading for profit requiring advances towards expenses are reminded that, under schemes administered by the Unemployment Grants Committee, 23, Buckingham Gate, S.W.1., part of the charges involved in approved works may, under certain conditions, be met by the State.

Attention is also drawn to the fact that the Public Works Loan Commissioners of Old Jewry, London, E.C. 2, have certain powers of granting loans to local authorities and other bodies and persons. Particulars as to the purposes for which, and the terms upon which, such loans may be granted, can be obtained from the Public Works Loan Commissioners direct.

B.—The expected benefit as regards employment, giving information as to the particular industries which will be affected, and the approximate date of commencement and the period of employment. If possible, an estimate should be given of the number of men who will be employed weekly during the first three months after work is commenced and subsequent periods (classified as far as practicable according to trades and localities).

C.—Charges which can be given as security.

On this point, the committee desire information as to the assets and revenues which will be available as security and particulars of any existing charges thereon. These particulars should be supplemented by copies, if available, of the audited balance sheets and profit and loss accounts for the past five years, and supplemented by a statement for the same period showing clearly the yearly net profits remaining after meeting all outlays and provisions (including depreciation, excess profits duty and corporation profits tax), and interest and sinking fund instalments on all debentures, etc., which will rank prior to the proposed loan.

D.—The additional yearly net revenue expected to be earned as a result of the proposed expenditure.

E.—From what source it is proposed to pay the interest on the loan during the period of construction, *e.g.*, whether out of existing funds or out of the proceeds of the loan.

F.—Evidence that the undertaking can be completed for the sum estimated.

G.—Particulars as to the preliminary formalities, if any, which will be necessary before issuing the loan or commencing the work (*e.g.*, sanction of parliament, meetings of debenture holders, shareholders, etc.).

H.—Particulars of any attempts which have already been made to finance the scheme, giving details of the terms which could have been obtained.

3. In accordance with the Trade Facilities and Loans Guarantee Act of 1922, the treasury is empowered to charge fees as follows:—

"For the purpose of meeting the costs and expenses incurred by the treasury in administering the said section one, there shall be charged in connection with applications for and the giving of guarantees under the said section, and other matters arising thereunder, such fees as the treasury may from time to time prescribe."

TRADE AND INDUSTRY OF BRITISH HONDURAS

According to statistics published in the latest Government report on British Honduras, the value of the colony's trade in 1921 was $6,388,591, of which $3,343,132 represented imports and $3,045,459 exports. The United States supplied 56 per cent of the imports and took 76 per cent of the exports; while the British Empire received 17 per cent of shipments from the colony, and furnished goods to the extent of 21 per cent. Although the trade of the colony for 1921 shows a falling off as compared with that of 1920, chiefly due to decrease in values, it has been none the less steadily maintained, and is in excess of that of 1917.

REDUCTION IN THE WORLD'S OUTPUT OF SHIPS

Trade Commissioner Harrison Watson

London, January 26, 1923.—It is convenient to deal simultaneously with the reports which Lloyd's Register of Shipping have issued on the "Mercantile Shipbuilding of the World in 1922" and the "Returns of Shipbuilding during the Last Quarter of 1922."

As would be anticipated from the almost universal depression which has existed in shipbuilding, the amount of tonnage launched in the world last year (2,467,084 tons) was considerably less than in 1921, the decrease totalling 1,875,000 tons. This falling-off was common to all countries with the exception of Germany, and indeed the most noteworthy feature of the year was the revival of shipbuilding in Germany, which has enabled that country to recapture the place which it held before the war as the second largest shipbuilding country in the world.

The actual tonnage of launchings during 1922, as compared with the previous year, in the leading shipbuilding countries is given in the following table:—

	1922 Tons	1921 Tons
United Kingdom	1,031,081	1,538,052
Germany	575,264	509,064
France	184,509	210,663
Holland	163,132	232,402
United States	119,138	1,006,413
Italy	101,177	164,748
Japan	83,419	227,425

Notes Regarding Production in Principal Countries

UNITED KINGDOM

During 1922, 235 merchant vessels of 1,031,081 tons were launched in the United Kingdom, which represented 41·8 per cent of the world's output, as compared with 35·5 per cent in 1921 and 58 per cent in 1913.

Of the tonnage launched during the year, 762,769 tons are for registration in this country, and 268,312 tons (or 26 per cent) for owners residing abroad. Some 97,600 tons are destined for Holland, 43,757 tons for France, 33,092 for the British Dominions, and 26,715 for Spain.

The returns for 1922 show that 91 vessels of between 5,000 and 10,000 tons each, and 17 of 10,000 tons and upwards, were launched, the largest being the *Franconia,* of 20,000 tons.

GERMANY

As compared with 1921, the German production was 66,000 tons higher, and constituted 40 per cent of the output in countries other than the United Kingdom.

The totals comprise 20 vessels of between 6,000 and 10,000 tons and 5 of 10,000 tons and upwards. The latter included the *Columbus* (35,000 tons) built at Danzig, and the largest ship launched in the world during 1922, and a steamer of about 20,000 tons constructed at Hamburg.

UNITED STATES

The decline in shipbuilding was more marked in the United States than in any other country, the 1922 output being 887,275 tons less than in 1921 and

nearly 4,000,000 tons lower than the record of 1919. The total only accounted for 8·3 per cent of the tonnage built outside of the United Kingdom. Two vessels of over 10,000 tons each were, however, completed during the year.

JAPAN

Japan too experienced a considerable decrease, the launchings representing a reduction of over 63 per cent as compared with the previous year. In relation to pre-war years, however, the present output still exceeds the figures for any year prior to 1914.

BRITISH DOMINIONS

The total tonnage produced in all the British Dominions during 1922 (62,765 tons) is about 67,000 tons less than in 1921.

The Canadian total (17,012 tons) is less than one-quarter of the output in 1921, and only one large vessel is included, namely, a lake steamer built at Port Arthur.

The tonnage launched in the other Dominions is 45,753 tons, of which 25,048 is attributed to Hong Kong and 14,998 to Australia.

OTHER COUNTRIES

No special features are recorded in the returns for other countries. In commenting, however, on the enormous decrease in the output of ships in the world in 1922 as compared with the record year of 1919—4,677,000 tons—Lloyd's Register calls attention to the fact that the total addition to the world's merchant navies by new construction during the nine years 1914-22 was far greater than that registered during the period 1905-13, the relative figures being 34,000,000 tons as against 22,500,000 tons.

SHIPPING UNDER CONSTRUCTION IN 1922

As regards the amount of tonnage under construction in the world at the close of 1922, the aggregate was 2,954,318 tons, but as this includes 564,000 tons on which work is suspended, the total actually being built was 2,390,000 tons. The corresponding figure for 1921 was 4,457,000 tons, but the drop since then is even greater than the figures indicate, since the statistics for Germany were not available last year and were not counted.

The decrease in construction in the United Kingdom progressed steadily throughout 1922, and the tonnage being built at the end of 1922, namely, 1,468,599 tons, is 1,171,720 tons less than the total in hand in December, 1921.

A favourable consideration, however, which improves the prospects for the immediate future is the fact that orders for new ships have recently increased, the total of new vessels commenced during the last quarter of 1922 amounting to about 231,000 tons, which is a substantial advance on the average for recent quarters.

Upon the other hand, this condition of affairs does not apply to shipbuilding yards abroad, where in many cases the berths remain vacant once the vessels in hand are completed.

SHIPMENT OF CANADIAN APPLES TO SOUTH AFRICA

Assistant Trade Commissioner J. Cormack

Cape Town, December 30, 1922.—Now that the arrival of this season's Canadian apples is over, the last cargo per ss. *Kaduna* having been unloaded this week, a few notes on their reception in the South African market this year should be of interest.

The fruit came direct from Montreal by the ss. *Benguela* and ss. *Kaduna,* and also via England by the ss. *Kenilworth Castle* and *Armadale Castle.*

The indirect shipments were less satisfactory because those coming via England were sent without refrigeration as far as England, and also because before arrival here, several cases were damaged by breakage and pilferage. There was also the handicap of additional freight and transport charges. No complaints of any kind were made to the writer with reference to the direct cargoes.

Importers state the opinion that the boxed trade is better than the barrelled, and the big percentage of the fruit this year was wrapped and packed in boxes.

The varieties shipped were—Jonathans, King David, MacIntosh Red, Spitzenberg, Ben Davies, Gano, Kings, Wagner and Winesaps. It was further stated that too many varieties had been shipped, and that in future it would be better to restrict the number of varieties. The MacIntosh Red variety is considered to be too soft to stand the pressure of the long journey, and while their appearance with regard to colour was very good, many of them showed flattened pressure spots at the points of contact. When the skin is peeled these spots are, of course, discoloured, and the fine appearance of the apple is lost.

Complaints were heard that the Kings and Wagners (barrelled from Ontario) after two days' exposure turned black in colour, and some even lost colour while still in cold storage.

The Spitzenbergs and Ganos were in fine condition, and were well thought of. The Jonathans and King David's of the first shipment were very good, but the Jonathans which arrived by the ss. *Kaduna* were too ripe, and this variety should not be sent in future in any but early season cargoes. The Ben Davies was considered to be inferior to the Ganos in colour, and in eating and selling qualities.

Generally speaking, the South African importers want a highly coloured apple, of sufficient hardness to withstand the pressure which will be sustained during the voyage, and they advise that only such varieties should be sent here. One importer who shipped 1,000 cases inland to Johannesburg in iced trucks, said that on arrival there 27 cases were unsaleable and 20 had to be sold at a reduced price. Another importer complained of the grading of the barrelled apples, stating that the ones were twos, and the twos were threes and fours.

Complaint was also made that the last shipment of apples did not arrive before Christmas as scheduled, but was still on board ship at that date. The writer was informed by the captain of the steamer in question that his ship was delayed by exceptionally bad weather.

The prices for the first shipment were from £5 to £4 10s. per barrel, while to-day they are £4 to £3 5s. For boxes, the price of 25s. remained steady for the first shipment, but in competition with the local fresh fruit now on the market, they are fetching from 22s. to 19s.

The general public in South Africa speak very highly of Canadian apples. This year shows an increase in the number of Canadian apples imported; while tributes to the ability of the growers to send perishable fruit such a long distance in such remarkable condition, have been heard on all sides.

WALLPAPER IMPORT TRADE OF CHILE

Trade Commissioner B. S. Webb

[This is the fifth of a series of reports on the Markets of Chile. The first, which dealt with Textiles, Agricultural Machinery and Implements, and Iron and Steel Products, was published in No. 989; the second, on Transportation Material, Industrial Machinery and Supplies, Tools and Hardware, appeared in No. 990; the third, on Chemicals and Drugs, Electrical Goods, Footwear, etc., was published in No. 991; and the fourth, on Foodstuffs, Wood and Wood Products, Pulp and Paper, Cement, etc., was published in the last issue (No. 992).]

The Republic of Chile is the second-best of the South American markets for wallpaper, its importations of this commodity averaging some 500 tons per annum. British manufacturers, up to the latest date for which statistics are available (1920), have supplied the market with approximately one-half of its requirements, but, judging from dealers' reports, it appears that they have lost a lot of ground during the past two years to Continental and United States exporters. Imports into Chile during 1916 are shewn below in comparison with the figures relating to 1920:—

	1916 Tons	1916 $ Canadian	1920 Tons	1920 $ Canadian
Great Britain	260	58,000	257	138,000=50 cents kilo.
Germany	19	5,200	174	35,000=20
United States	70	14,400	137	63,000=46
France	16	3,600	13	6,000=46
Sweden	66	13,700	13	6,000=46
All countries	447	$99,000	615	$249,000

COMPETING COUNTRIES

Since 1920, however, importations from France, Germany, and Belgium have been on a larger scale than is indicated above, whilst imports from England and Sweden are reported to have decreased. Canadian manufacturers do not appear in official statistical publication as exporters to Chile, although certain quantities of Canadian wallpaper have been sold in this market for some years past; this omission is probably due to the fact that Canadian paper is usually shipped to Chile through the port of New York and is entered here as merchandise of United States origin. It is therefore not possible to ascertain the quantities of Canadian wallpaper here, although from inquiries made on the spot it would appear that they are smaller than they would be if more active representation could be secured for the manufacturers. Altogether there are some twenty foreign manufacturers of wallpaper with resident local agents in Chile, of which number five are English, three Canadian, three American, three Belgian, three French, and three German. In addition to the resident local agents, a number of travelling representatives of various nationalities call at Santiago and Valparaiso at more or less regular intervals. Amongst the English manufacturers doing a fairly good business here are the Wallpaper Manufacturers, Limited, and Messrs. Huntingdon Frères.

QUALITIES

The Chilian market for wallpaper is entirely different from the Argentine in that, whilst the latter demands the best, the Chilian calls for the cheapest. A travelling representative reports that in Argentina a customer's first remark is almost invariably, "Show me your best designs," while in Chile the first question is, "Which are your cheapest papers?"

The English papers sold in Chile appear to be in a class by themselves, being of high-class colouring and design and printed on light-weight stock of good quality; and English manufacturers do not compete for the business in cheap wallpapers in Chile. Canadian and American papers are considered superior to Continental papers—a few high-class French papers excepted. The stock, although heavier than the English, is about equal in weight to the Continental papers, but is usually considered to be of better quality.

The French and German papers which have been arriving lately are printed on very bad paper which becomes yellow a short time after hanging, the colours either fading or running, and the designs are almost outrageous, being made up of deep reds, purples, green, with gold leaves and similar inartistic combinations. According to the customs returns for 1920, English papers imported averaged 50 cents per kg. in value; American, French, and Swedish 46 cents, and German 20 cents per kg. When the lighter weight of English papers is taken into consideration, it will be seen that their prices per roll are not so much higher than those of other countries.

One Santiago regular dealer who purchased a large order of German papers reports that in spite of the low prices the quality is so poor that the goods are almost unsaleable.

DESIGNS

Chilian taste in wallpaper undoubtedly runs to highly ornamental and showy designs. Tapestry patterns were largely sold at one time, but the demand for these has now eased off somewhat. Dealers are unable to report any definite tendency at the moment, the customer's final selection being almost invariably the cheapest pattern possible.

LENGTHS AND WIDTHS

The Chilian trade is accustomed to the 8-metre length, and undoubtedly prefers it. The preference for this length, however, appears to be merely a matter of custom, the interior walls of Chilian houses being of varying heights and not uniformly 4 metres high as is the case in Argentina. During the war period the trade became accustomed to a certain extent to the 16-yard roll, but the preference for the 8-metre roll still remains.

From conversation with the dealers, it appears that as far as they are concerned their objection to handling the 16-yard roll is the difficulty they experience in persuading the paperhangers that they are receiving a double roll, these latter being inclined to assert that they are not receiving a double roll and to ask for a rebate in consequence. Canadian and American papers come in 16-yard rolls and are sold in four qualities, but it is obvious and undisputable that sales would be larger if they could be cut to 8- or 16-metre lengths.

PACKING

The market does not call for any special requirements in packing, the usual export bales wrapped in burlap being sufficient protection to ensure safe arrival of goods. The manufacturers of all countries, with the exception of Germany, make an extra charge for packing, whereas the Germans supply it free. A Santiago dealer has supplied a sample of a substitute for burlap which is being used by German shippers for wrapping wallpaper bales. It is made of twisted strands of brown paper and requires close examination to distinguish it from genuine burlap. The dealer in question reports that this artificial burlap appears to have given good results in practice. Samples have been sent to the Department of Trade and Commerce, Ottawa, where they can be inspected by interested Canadian manufacturers, on application to the Director, Commercial Intelligence Service.

PRESENT CONDITIONS

All dealers report that sales of wallpaper have fallen off heavily, a fact which they attribute to the 50 per cent increase in customs duties which became effective in February of last year and to the present high cost of foreign exchange, and there do not appear to be any prospects for an immediate improvement. They anticipate that business for some time will be limited to absolutely essential requirements in the cheaper patterns, and that some years will elapse before orders will be placed on a larger scale and for higher-priced patterns.

Terms.—Wallpaper is sold in Chile on exceptionally long terms. All the regular dealers are allowed 90 to 120 days, and hardware stores different terms according to their credit standing, and ninety days sight draft terms will have to be given to first-class importers by any Canadian firm determined to build up a substantial business here.

Local Manufacturers of Wallpaper.—For some time past an establishment in Chile has been colouring locally made paper and selling it as cheap wallpaper. It is known that this firm is now considering the instalment of a machine for printing three- and four-colour designs. Quotations are being asked for the installing of the machine, but whether or not anything definite comes of it is not yet known.

Chilian Importers of Wallpaper.—The cities of Santiago and Valparaiso consume more than half of the total importation of wallpaper, the remainder being sold in Concepcion, Valdivia, Iquique and Chillan. In Santiago there are seven regular wallpaper dealers, six in Valparaiso, four in Antofagasta, and two in Concepcion. Nearly all hardware dealers, however, stock cheaper wallpapers, and some of the larger ones stock it for distribution in closed bales. A complete list of regular wallpaper dealers in Chile, together with a list of hardware and furniture stores carrying wallpapers as a side line, is on file at the Department of Trade and Commerce, Ottawa, and may be obtained by interested Canadian firms on application to the Director, Commercial Intelligence Service.

MAIL SHIPMENTS TO CUBA

Senor Carlos Anido, Acting Consul for Cuba, Toronto, writes as follows respecting certain changes which have been made in regard to mail shipments to Cuba:—

Local factories, business houses and individuals who are now making shipments by mail to Cuba are informed that changes have been made in the method of sending these packages, and each package of a shipment for Cuba which is not accompanied by a consular invoice must have customs declaration attached. The notice of the changes reads as follows:—

Senders of packages for Cuba mailed at localities where Cuban consular representatives are located should be informed that the Cuban consular regulations require for shipments of whatever value the presentation to such Cuban consular representatives, for consular certification, one original invoice and four copies when shipments are addressed for delivery at Havana, or one original invoice and three copies when shipments are addressed for delivery in other parts of the island, only one set (four or five copies, as the case may be) of invoices being necessary for one shipment sent at one time to one addressee, no matter of how many packages the shipment consist.

The wrappers of packages for which consular invoices have been secured should be marked with the series letter and number of such consular invoice; for example, "Consular Invoice B, 1020".

The consulate office retains all copies of the invoices except the original, which, after being viséd, is returned to the sender, who should either inclose such original invoice in the package or send the same under separate cover to the addressee. When the consular invoice is inclosed in the package, the wrapper should be so endorsed, in which case no

customs declaration is necessary. When the shipment consists of more than one package and the consular invoice accompanies same, no customs declaration is necessary on any of the packages, but each package should be numbered consecutively and endorsed as to the particular package containing the consular invoice.

The shipper need pay for certification of only the original copy of the invoices, as follows: Invoices for less than $5 cost 10 cents. Invoices from $5 to $49.99 cost 50 cents. Invoices from $50 to $200 cost $2. For every additional $100 or fraction, 25 cents.

No consular invoices are required for shipments from localities without Cuban consular representation, but commercial invoices (single copy only) covering such shipments are necessary, which commercial invoices should be sent to the addressees. Each package of shipment for Cuba which is not accompanied with a consular invoice must have a customs declaration attached.

THE NEW CHINESE TARIFF

Mr. G. A. Rolf Emery, Assistant Canadian Government Trade Commissioner, Shanghai, China, under date of January 4, 1923, writes that: "By Customs Notification No. 1008, Mr. L. A. Lyle, Commissioner of Customs, informed the public that the Revised Chinese Import Tariff will come into force on January 17, 1923."

COMMERCIAL NOTES FROM NEW SOUTH WALES

Commercial Agent B. Millin

Trade Conditions in New South Wales

Sydney, December 28.—With the exception of the usual Christmas lines, business in New South Wales lacks animation. Various factors have contributed to this unsatisfactory state of affairs, such as the elections for the Commonwealth Parliament, and the situation that has arisen owing to the unusual accumulation of Australian funds in London, which has compelled the banks to act less liberally than usual and curtail advances owing to the difficulty of transferring funds to Australia.

Recent heavy and general rains all over the State have, however, dispelled the overhanging shadow of a threatened drought, which, if it had followed on the previous dry year, would have been disastrous. Optimism now pervades the pastoral industry, and the outlook is better than it has been for months past. Unfortunately for the wheat farmers, the rain came too late, and it will be a lean year for them as the New South Wales crop is not expected to yield more than half the total of last season.

Hydro-Electric Power in Australia

With the exception of Tasmania, none of the states of the Commonwealth have any large stores of water at an elevation which could be used for the generation of electric power. The Tasmanian State Government some years ago realized the value of its great asset in the shape of large inland lakes containing almost unlimited supplies of water, and accordingly spent large sums of money in making use of the power available. Following on the wake of the installation, some very large factories were establishd, many of which ar now in full working order. The power available in the state, if all possible sources are utilized, is stated to be in the neighbourhood of 400,000 horse-power.

The question of utilizing the resources of the State of New South Wales has been under consideration for some time, and it is estimated that there is an aggregate 412,000 horse-power. This is available from rivers, and it will therefore be first necessary to construct extensive storage dams. The first of these

proposed schemes, although very small, has just been completed, and other undertakings are to be placed in hand at an early date. Canadian manufacturers of hydro-electric machinery will be advised of any requirements in that direction.

Forestry Exhibit at Sydney

In view of the growing realization of the importance of forestry, increased attention has been paid of late years to the subject of re-afforestation, and with a view of drawing attention to the valuable timbers grown in Australia a very excellent display was recently exhibited at Sydney.

Compared with its vast territory, Australia may be described as a sparsely timbered country, but its forests amply make up for their limited extent by the exceptional value of the products they yield. The predominating trees are eucalyptus—a family common to the Antipodes alone—which produce a hardwood timber not excelled for strength, durability and constructional utility by any other timbers of the world. Amongst a variety of other trees to be found in Australian forests are numerous trees yielding timber of fine grain and beauty, suitable for cabinet work and ornamental wares. Without exaggeration it can be said that in variety of useful woods Australia is one of the most richly endowed countries in the world. Australian forests are, however, mainly of the hardwood variety. There is a distinct shortage of coniferous softwood, which is reflected in the imports. These prior to the war were heavy, and are again steadily growing as the building trade returns to normal conditions. So far as softwoods are concerned, Australia must continue to be a large importer for many years to come, as the attempts at reafforestation have hitherto been comparatively of little account.

Steel Manufacture at Newcastle, New South Wales

Just prior to the outbreak of war, a project was in hand by the Broken Hill Proprietary Co., Ltd., for the establishment of steel and iron works at Newcastle, sixty miles north of Sydney. Owing to the difficulty of obtaining supplies after 1914 the work was expedited with the result that the works were completed and opened in June, 1915.

The blast furnace plant consists of four furnaces, two with a nominal daily capacity of 450 tons, one of 500 tons, and a foundry furnace of 100 tons, or with an approximate annual capacity of about 460,000 tons of iron. The steel plant consists of seven basic open-hearth furnaces with an output capacity of approximately 300,000 tons of steel ingots per annum. A complete mill plant has also been installed for the manufacture of light structural material and merchant bars, etc., with an annual capacity of 100,000 tons.

For several years the company was working at full capacity, but later on, with the dumping of cheaper foreign steel into Australia and the high rate of local wages and coal, the company was unable to compete and accordingly shut down some months ago. With the object of reopening, the company has now purchased its own coal mine on the Maitland field adjacent to Newcastle in order to lessen the cost of production. Application was made to the Arbitration Court for a reduction in the rates of wages in the general grades, but this was refused.

The company now therefore holds the supply of all its raw material in the shape of iron ore, coal and limestone in its own hands, and each of these materials, which is of the best, is in almost unlimited supply.

Wool Sales at Sydney

Excited competition and an excellent range of values from a producer's point of view still characterize the wool sales. Prices all round are very firm, and there is no shade of weakness anywhere visible. The market to-day

depends upon no single buying factory, as every section is buying keenly. Consumption is proceeding abroad on abnormal lines, and there are no accumulations of purchases to endanger the position. Some speculative buying has certainly been done, but the great bulk of the wool sold here has gone direct to consumers and is being rapidly absorbed. The latest news from wool-using centres is entirely satisfactory to sellers and engenders a feeling of confidence in the future.

It is now generally recognized that if consumption continues on the present scale there will not be sufficient merino wool produced this year to meet the world's requirements. This condition actually prevailed last year, but was discounted by the fact that there were heavy stocks of carry-over wools to make up the deficiency, and the trade practically absorbed a clip and a half in one season.

This season the position is different, and whilst there is a large stock of crossbreds to make up the deficiency, fashion still runs strongly on fine wools. A solid improvement is therefore looked for in crossbreds, and already there is a hardening in comebacks and crossbreds, and the demand for other sorts has distinctly improved.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING FEBRUARY 6, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement on the nominal closing quotations for all the principal exchanges for the week ending February 6, 1923. Those for the week ending January 30 are also given for the sake of comparison.

			Parity	Week ending Jan. 30, 1923.	Week ending Feb. 6, 1923.
Britain	£	1.00	$4.86	$4.6886	$4.7355
France	Fr.	1.	.193	.0611	.0648
Italy	Lire	1.	.193	.0480	.0493
Holland	Florin	1.	.402	.3984	.3997
Belgium	Fr.	1.	.193	.0543	.0573
Spain	Pes.	1.	.193	.1574	.1591
Portugal	Esc.	1.	1.08	.0480	.0455
Switzerland	Fr.	1.	.193	.1886	.1907
Germany	Mk.	1.	.238	.000022	.000027
Greece	Dr.	1.	.193	.0131	.0126
Norway	Kr.	1.	.268	.1884	.1865
Sweden	Kr.	1.	.268	.2705	.2665
Denmark	Kr.	1.	.268	.1936	.1900
Japan	Yen	1.	.498	.4888	.4907
India	R.	1.	2s.	.3309	.3301
United States	$	1.	$1.00	1.0106	1.0118
Mexico	$	1.	.498	.4964	.4978
Argentina	Pes.	1.	.424	.3739	.3756
Brazil	Mil.	1.	.324	.1157	.1176
Roumania	Lei	1.	.198	....	....
Jamaica	£	1.	4.86	4.6943	4.7456
British Guiana	$	1.	1.		
Barbados	$	1.	1.		
Trinidad	$	1.	1.		
Dominica	$	1.	1.		
Grenada	$	1.	1.	.9796-.9822	.9808-.9834
St. Kitts	$	1.	1.		
St. Lucia	$	1.	1.		
St. Vincent	$	1.	1.		
Tobago	$	1.	1.		
Shanghai, China	Tael	1.	.708	.7364	.7323
Batavia, Java	Guilder	1.	.402	.3941	.3933
Singapore, Straits Settlements	$	1.	.567	.5558	.5565

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those speciallv interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1217. Wheat.—A firm in Rome would like to hear from Canadian exporters of wheat.

1218. Wheat.—A firm in Milan are prepared to import Canadian wheat.

1219. Wheat.—A firm in Italy are anxious to secure offers for Canadian wheat.

1220. Wheat.—An Italian firm are in a position to import wheat from Canada.

1221. Wheat.—A Milan firm would like to import wheat from Canada.

1222. Wheat.—A firm of Venice would like to get in touch with Canadian exporters of wheat.

1223. Wheat.—A firm of wheat importers in Turin desire to get into touch with Canadian shippers of wheat.

1224. Wheat.—An Italian firm wish to purchase wheat from Canada.

1225. Wheat.—A firm in Naples desire to import Canadian wheat.

1226. Wheat, Oats, and Rye.—A firm in Genoa would like to receive offers from Canadian exporters of wheat, oats, and rye.

1227. Wheat, Oats, and Rye.—A firm in Genoa would like to receive offers for Canadian wheat, oats, and rye.

1228. Wheat, Oats, and Rye.—A Genoa firm are willing to import Canadian wheat, oats, and rye.

1229. Wheat, Oats, Rye, and Seeds.—A concern in Genoa desire to import wheat, oats, rye, and seeds from Canada.

1230. Wheat, Oats and Rye, Oilseeds.—A firm in Genoa desire to import wheat, oats, rye, and oilseeds from Canada.

1231. Wheat, Oats, Rye, and Oilseeds.—A firm in Milan desire communications from Canadian shippers of wheat, oats, rye, and oilseeds.

1232. Wheat, Rye, and Oats.—A Genoa firm are in a position to import wheat, rye, and oats from Canada.

1233. Wheat, Rye, and Oats.—Quotations are requested by a Genoa firm for Canadian wheat, rye, and oats.

1234. Wheat, Oats, and Rye.—A concern in Italy desire to represent a Canadian company exporting wheat, oats, and rye. Canadian exporters are asked to communicate.

1235. Wheat, Oats, Rye, and Coal are imported by a firm in Genoa. Canadian exporters should communicate.

1236. Wheat, Rye, and Oats.—A firm in Genoa would be willing to import Canadian wheat, rye, and oats.

1237. Rolled Oats.—A Christiania firm wish to act as agents in Norway for exporters of rolled oats.

1238. Flour.—A Christiania firm desire to act as agents in Norway for Canadian flour exporters.

1239. Butter and Eggs.—A Manchester firm inquire for butter and eggs. Quotations should be c.i.f. Manchester.

1240. Canned Lobster and Salmon.—A Christiania firm wish to act as agents in Norway for exporters of canned lobster and salmon.

1241. Canned Fruits.—A Christiania firm wish to act as agents in Norway for exporters of canned fruits.

1242. Sugar, Flour, and Canned Goods.—A broker and importer in Southampton, England, is open to represent Canadian manufacturers of sugar, flour, and canned goods.

1243. Canned Goods.—A large foreign import house, with head office in Yokohama, being largely interested in fishing and fur stations along the Siberian and Kamchatka coasts, desire to hear from Canadian firms in a position to supply canned vegetables and fruit.

1244. Dried Vegetables.—A Japanese broker, who indirectly supplies the navy with dried vegetables, desires to hear from Canadian firms evaporating vegetables that might be of interest to the Japanese Navy. Samples and prices requested.

1245. Evaporated Apples.—A Christiania firm wish to act as agents in Norway for exporters of evaporated apples.

1246. Apples.—A Christiania firm desire to act as agents in Norway for apple exporters.

Miscellaneous

1247. Bristles and Dressed Horse Hair.—A Manchester firm are always open to consider samples and quotations on bristles and horse hair for brush-making.

1248. Furs and Skins.—A Manchester firm wish to represent manufacturers of furs suitable for glove tops, macks and linings; also for ladies' coats, etc.

1249. Hoofs, Horns, Bones, and Tallow.—A firm in Nottinghamshire are always open to purchase hoofs, horns, bones, and tallow. Prices should be c.i.f. English port.

1250. Textile Mill Waste.—A firm in Nottinghamshire are always open to purchase wool and cotton waste. Prices should be c.i.f. English port.

1251. Paper.—A Manchester firm are open to purchase all classes of papers, but more especially wrapping papers and krafts.

1252. Paper Pulp.—A Japanese import house interested in pulp and paper would be glad to hear from Canadian firms able to supply bleached and easy bleached pulp.

1253. Grey Acetate of Lime.—A Liverpool firm ask for quotations on 50 to 100 tons of the above, minimum percentage 78, *pro rata* allowance to be made on basis of 80 per cent (Stillwall and Gladdings test).

1254. Steam Radiators.—A Japanese import house specializing in the importation of all kinds of heating appliances would be glad to hear from Canadian manufacturers in a position to quote on radiators of all kinds. Catalogues and price lists should be submitted.

1255. White Burley Tobacco Leaf.—An important supplier of tobacco leaf to the Imperial Government Monopoly Bureau desires samples and prices of Canadian tobacco leaf.

1256. Doors.—A Liverpool firm, who have been selling American Oregon pine or Douglas fir doors, wish to transfer this business to British Columbia. Contracts entered into for annual quantities of 100,000. Alternatively, Eastern pine door offers will be considered. Essential that doors be produced by union labour.

1257. Tools.—Well-established Brussels firm of machine and tool makers, especially interested in wood and metal-working tools, desire to enter into relations with Canadian firms exporting these articles.

1258. Dowels.—A London firm of timber merchants are open to purchase best quality dowels, and invite quotations c.i.f. London from Canadian manufacturers for the following specifications: 20,000 $\frac{1}{4}$-inch by 36-inch; 20,000 $\frac{5}{16}$-inch by 36-inch; 20,000 $\frac{3}{8}$ inch by 30-inch; 20,000 $\frac{3}{8}$-inch by 36-inch; 20,000 $\frac{7}{16}$-inch by 30-inch; 20,000 $\frac{1}{2}$-inch by 36-inch; 20,000 $\frac{5}{8}$-inch by 36-inch; 10,000 $\frac{3}{4}$-inch by 30-inch; 10,000 $\frac{7}{8}$-inch by 36-inch; 20.000 $\frac{7}{32}$-inch by 36-inch. Best quality smooth birch dowels, free from knots required.

1259. Paper and Strawboards; Wire Nails; Mouse Traps, Washing Boards, Clothes Pegs, and Woodenware.—A London manufacturers' agent, who claims an established connection with the London wholesale and shipping trade, wishes to secure the representation of Canadian manufacturers of paper and strawboards of all kinds, and goods which are handled by wholesale hardware firms, such as wire nails, mouse traps, washing boards, clothes pegs, and all lines of domestic woodenware.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From Halifax

To Liverpool and Queenstown.—Andania, Cunard-Anchor-Donaldson Line, Feb. 12; Ausonia, Cunard-Anchor-Donaldson Line, Feb. 26.

To Glasgow.—Saturnia, Cunard-Anchor-Donaldson Line, Feb. 25.

To Plymouth, Cherbourg, and London.—Antonia, Cunard-Anchor-Donaldson Line, March 9.

To Bermuda, British West Indies, and British Guiana.—Royal Mail Steam Packet Co.'s ships, Feb. 16, and every fortnight thereafter.

To Barbados, Trinidad, and Demerara.—Canadian Coaster, Canadian Government Merchant Marine, Ltd., Feb. 24.

To Santiago (Cuba), Kingston, Montego Bay and St. Ann's Bay (Jamaica).—Andalusia, Pickford & Black, Feb. 28.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—Canadian Fisher, Canadian Government Merchant Marine, Ltd., March 1.

To Guantanamo, Santiago (Cuba), and Kingston, (Jamaica).—Ottar, Pickford & Black, Feb. 14.

To Australia and New Zealand.—Canadian Seigneur, Canadian Government Merchant Marine, Ltd., Feb. 20.

To Newfoundland.—Canadian Sapper, Canadian Government Merchant Marine, Ltd., Feb. 21.

From North Sydney

To St. John's (Nfld.).—Kyle, Reid-Newfoundland Co., Tuesday, Thursday and Saturday every week; Sable I., Farquhar Steamship Co., every Saturday.

From St. John

To London.—Brant County, I.C. Transports, Ltd., Feb. 15; Batsford, Canadian Pacific Steamships, Ltd., Feb. 20; Canadian Victor, Canadian Government Merchant Marine, Ltd., Feb. 21; Rapidan, Furness Line, Feb. 27.

To Manchester (via Halifax).—Manchester Producer, Manchester Line, Feb. 15; Manchester Regiment, Manchester Line, Feb. 24.

To Liverpool.—Marburn, Canadian Pacific Steamships, Ltd., Feb. 16; Montclare, Canadian Pacific Steamships, Ltd., Feb. 23; Marloch, Canadian Pacific Steamships, Ltd., March 2; Canadian Miller, Canadian Government Merchant Marine, Ltd., March 3.

To Glasgow.—Canadian Voyageur, Canadian Government Merchant Marine, Ltd., Feb. 15; Marburn, Canadian Pacific Steamships, Ltd., Feb. 16 (via Liverpool); Canadian Squatter, Canadian Government Merchant Marine, Ltd., Feb. 21; Cabotia, Cunard-Anchor-Donaldson Line, Feb. 28; Metagama, Canadian Pacific Steamships, Ltd., March 1.

To Cardiff and Swansea.—Canadian Navigator, Canadian Government Merchant Marine, Ltd., Feb. 14.

To Hull (via Halifax).—Ariano, Furness Line, Feb. 23.

To Belfast.—Melmore Head, Head Line, Feb. 25.

To Dublin, Londonderry, and Cork.—Melmore Head, Head Line, Feb. 25.

To Avonmouth.—Cabotia, Cunard-Anchor-Donaldson Line, Feb. 28.

To Antwerp.—Batsford, Canadian Pacific Steamships, Ltd., Feb. 20.

To Rotterdam.—Brant County, I.C. Transports, Ltd., Feb. 15; Hoerda, I.C. Transports, Ltd., Feb. 28; Essex County, I.C. Transports, Ltd., March 11.

To Bermuda, Barbados, Trinidad and Demerara.—Montezuma, Canadian Pacific Steamships, Ltd., Feb. 23.

To Havre and Hamburg.—Hastings County, I.C. Transports, Ltd., Feb. 18.

To Australia and New Zealand.—Erroll, New Zealand Shipping Co., Feb. 21.

To South Africa.—New Mexico, Elder, Dempster & Co., Feb. 25.

To Rio de Janeiro, Santos, Montevideo and Buenos Aires.—A steamer, Houston Line, Feb. 20.

From Vancouver

To Honolulu, Suva, Auckland, and Sydney.—Makura, Canadian-Australasian Royal Mail Line, Feb. 23.

To Yokohama, Kobe, Nagasaki, Shanghai, Manila and Hong Kong.—Empress of Asia, Canadian Pacific Steamships, Ltd., Feb. 22.

To Yokohama, Kobe, Shanghai and Hong Kong.—Arabia Maru, Osaka, Shosen Kaisha, Feb. 17; Empress of Canada, Canadian Pacific Steamships, Ltd., March 8.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Yokohama Maru, Nippon Yusen Kaisha, Feb. 28.

To Yokohama and Kobe.—Tokiwa Maru, Nippon Yusen Kaisha, Feb. 20.

To Yokohama, Kobe, Hong Kong, and Manila.—Tyndareus, Blue Funnel Line, Feb. 16; Protesilaus, Blue Funnel Line, March 12.

To Australian Ports.—Canadian Importer, Canadian Government Merchant Marine, Ltd., March 6.

To Wellington, Melbourne, and Sydney.—Waiotapu, Canadian-Australasian Royal Mail Line, Feb. 16.

To the Orient.—Canadian Winner, Canadian Government Merchant Marine, Ltd., Feb. 28.

To London and Liverpool.—Dramatist, Harrison Direct Line, Feb. 20.

To Yokohama, Kobe, Moji, Darien, Shanghai and Hong Kong.—Arabia Maru, Osaka Shosen Kaisha, Feb. 14; Arizona Maru, Osaka Shosen Kaisha, Feb. 18.

To Yokohama, Kobe, Moji, Shanghai and Manila.—Manila Maru, Osaka Shosen Kaisha, Feb. 27.

To London, Hull, Hamburg and Copenhagen.—Peru, East Asiatic Co., early February; Siam, East Asiatic Co., Inc., late February.

EXPORTS OF BALATA FROM VENEZUELA

It is anticipated that in the course of the next few months there will be large shipments of balata from Venezuela. This is consequent on the fact that recently there has been a reduction of the export tax from 50 centimes per kilo. to 40 centimes per kilo., the former tax having hitherto made it more advantageous for gatherers and exporters to ship balata from the territories of Amazonas and Bolivar through the Brazilian port of Manaos rather than through Venezuelan territory. Towards the end of November the price of balata per 100 kilos. was 430 bolivars. The United States Consul at La Guaria reports that balata exports from the port of Cuidad Bolivar account for 50 per cent of the total exports of that port. During 1921 exports of balata from Venezuela amounted to 954,578 kilos. valued at 5,014,194 bolivars, of which England received the largest share, amounting to 431,503 kilos. and valued at 2,457,316 bolivars. The United States, Trinidad, Germany, and Holland were other purchasers.

MARKET FOR BUILDING CEMENT IN PORTUGUESE EAST AFRICA

Annual imports of building cement into Portuguese East Africa amount to nearly 10,000 tons says the United States *Commerce Reports*. The material is used principally by the railways, but a large proportion is employed in the construction of residences in the larger towns. The greater part of the cement is purchased from the Transvaal, though some is imported, notably from Germany and Great Britain. A small amount comes from the United States, but the freight differential, due to distance and lack of return cargoes, renders it very difficult for the American article to compete. In addition, the territory of the Mozambique Co. imports for its own use about 1,500 tons annually.

LIST OF ACTS ADMINISTERED AND PUBLICATIONS ISSUED BY THE DEPARTMENT OF TRADE AND COMMERCE

Copyrights Act (a). Cullers Act. Electricity and Fluid Exportation Act (b). Electricity Inspection Act (b). Electric Units Act (b). Gas Inspection Act (b). Gold and Silver Marking Act. Grain Act. Inspection and Sale Act. Inspection of Water Meters Act (d). Lead Bounties Act. Patent Act (a). Petroleum Bounty Act. Statistics Act (c). Trade Mark and Design Act (a). Timber Marking Act (a). Weights and Measures Inspection Act (d). Zinc Bounties Act.

MISCELLANEOUS

Annual Report of the Department of Trade and Commerce.
Annual Report of Board of Grain Commissioners for Canada.
Annual Report re Mail Subsidies and Steamship Subvention.
List of Licensed Elevators, etc.
Patent Office Record (Weekly) (a).
Annual Report of Weights and Measures, Electricity and Gas (d).
Dominion Grain Research Laboratory (1920).
Grain Inspection in Canada (1914).
Rules and Forms of the Canadian Patent Office (a).
Rules and Regulations made by the Board of Grain Commissioners.
Trial Shipments of Wheat from Vancouver via the Panama Canal to the United Kingdom (1918). (Out of print).

PUBLICATIONS OF THE COMMERCIAL INTELLIGENCE SERVICE (e).

Commercial Intelligence Journal, containing Reports of Trade Commissioners and other Commercial Information.
Apple Market Conditions: Reports from the Canadian Fruit Trade Commissioner at Liverpool (periodically).
Canada-West Indies Conference (1920).
Canadian Economic Commission to Siberia (1919).
Fruit Production in Australia (1922).
German War and Its Relation to Canadian Trade (1914).
Indian Empire as a Market for Canadian Products (1922). (Price outside Canada, 35 cents.)
Mexico as a Field for Exports (1921). (Price outside Canada, 35 cents.)
Markets of Jamaica and the Republic of Colombia, Venezuela, and Panama (1922). (Price outside Canada, 35 cents).
Packing for Overseas Markets (1922). (Price outside Canada, 35 cents.)
Report of Special Trade Commission to Great Britain, France and Italy, (French and English) (1916).
Russian Trade (1916).
Tariffs of the British West Indies (in leaflets).
Trade after the War (1916).
Timber Import Trade of Australia (1917).
Trade between Canada and the British West India Colonies (1920).
Trade of the New Countries of South-east Europe (1921). (Price outside Canada, 35 cents.)
Trading Opportunities in Scandinavia (1922). (Price outside Canada, 35 cents.)
Trading with Egypt (1921). (Price outside Canada, 35 cents.)
Trade with Greece (1921).
Trade with South China (1918).
Trading with Spain (1920).
Trading with Switzerland (1922). (Price outside Canada, 35 cents.)
Toy Making in Canada (1916).
West Africa and Its Opportunities for Canadian Trade (1921). (Price outside Canada, 35 cents.)

PUBLICATIONS OF THE BUREAU OF STATISTICS

The following is an abbreviated list of publications of the Bureau of Statistics. For a complete list, see note (c).
Census of Canada (1911). VI Vols., Bulletins, etc.
Census of Prairie Provinces (1916).
Miscellaneous Statistics respecting the following: Criminal; Education; Finance (Provincial and Municipal); Transportation, including railways and tramways, express, telegraphs, telephones, water, etc.; Production, including agriculture, furs, fisheries, forestry, mining and manufactures; Vital (annual and monthly).
Year Book of Canada.
Report of the Dominion Statistician, Annual.
Trade of Canada (Imports and Exports), Annual and Monthly.
Trade (Internal), including grain, livestock, coal, prices, etc.

NOTE.—(a) Applications should be addressed to: Commissioner of Patents, Ottawa. (b) Applications should be addressed to Director Gas and Electricity Inspection Service, Ottawa. (c) Applications should be addressed to: Dominion Statistician, Ottawa. (d) Applications should be addressed to: Director Weights and Measures Service, Ottawa. (e) Applications should be addressed to the Director, Commercial Intelligence Service, Ottawa.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 248 St. James street, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic.

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address, Canadian.*

Australia.

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium.

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil.

Major E. L. McColl. Address for letters—Caixa (P.O. Box) 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies.

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China.

J. W. Ross, Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba.

Address: 400 and 401 Teniente Rey 11, Havana. (Post-office Box 1290.) *Cable Address, Cantracom.*

France.

Lieut-Col. Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany.

L. D. Wilgress, Care British Consulate-General, Hamburg. (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland.

Norman D. Johnston, Zuidblaak 26, Rotterdam. *Cable Address, Watermill.*

India and Ceylon.

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy.

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica.

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan.

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico.

C. Noel Wilde. Address for letters, Apartado Num. 26, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian*

New Zealand.

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa.

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United States.

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Australia.

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Norway and Denmark.

C. E. Sontum, Grubbegd, No. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies.

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Commercial Intelligence Journal

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DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
Hon. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

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314

TABLE OF CONTENTS

Commercial Intelligence Journal

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CONVENTION OF COMMERCE BETWEEN CANADA AND ITALY, 1923

GEORGE *R.I.*

GEORGE, by the Grace of God, of the United Kingdom of Great Britain and Ireland and of the British Dominions beyond the Seas King, Defender of the Faith, Emperor of India, etc., etc., etc. To all and singular to whom these Presents shall come, Greeting!

Whereas, for the better treating of and arranging certain matters which are now in discussion, or which may come into discussion, between Us and Our Good Brother the King of Italy respecting commercial relations between Italy and Canada, We have judged it expedient to invest fit persons with Full Power to conduct the said discussion on Our part: Know Ye, therefore, that We, reposing especial Trust and Confidence in the Wisdom, Loyalty, Diligence, Circumspection of Our Trusty and Well-beloved the Honourable William Stevens Fielding, Member of the Parliament of Canada, Member of Our Privy Council for Canada, Minister of Finance of Our Dominion of Canada; and Our Trusty and Well-beloved the Honourable Ernest Lapointe, One of Our Counsel learned in the Law, Member of the Parliament of Canada, Member of Our Privy Council for Canada, Minister of Marine and Fisheries of Our Dominion of Canada, have named, made, constituted and appointed, as We do by these Presents name, make, constitute and appoint them Our undoubted Commissioners, Procurators and Plenipotentiaries; Giving to them all manner of Power and Authority to treat, adjust and conclude with such Minister or Ministers as may be vested with similar Power and Authority on the part of Our Good Brother the King of Italy any Treaty, Convention or Agreement that may tend to the attainment of the above-mentioned end, and to sign for Us, and in Our name, everything so agreed upon and concluded, and to do and transact all such other matters as may appertain thereto, in as ample manner and form, and with equal force and efficacy, as we Ourselves could do if personally present: Engaging and Promising, upon our Royal Word, that whatever things shall be so transacted and concluded by Our said Commissioners, Procurators and Plenipotentiaries, shall, subject if necessary to Our Ratification, be agred to, acknowledged and

accepted by Us in the fullest manner, and that We will never suffer, either in the whole or in part, any person whatsoever to infringe the same, or act contrary thereto, as far as it lies in Our Power.

In witness whereof We have caused the Great Seal of Our United Kingdom of Great Britain and Ireland to be affixed to these Presents, which We have signed with Our Royal Hand.

Given at Our Court of Saint James, the Twelfth day of December in the Year of Our Lord, One thousand Nine hundred and Twenty-two and in the Thirteenth Year of Our Reign.

[SEAL.]

CONVENTION OF COMMERCE

BETWEEN

CANADA AND ITALY

His Majesty the King of the United Kingdom of Great Britain and Ireland and of the British Dominions beyond the Seas, Emperor of India, and His Majesty the King of Italy, being desirous of improving and extending the commercial relations between Italy and Canada, have resolved to conclude a Convention with that object and have named as their respective Plenipotentiaries, that is to say:

His Majesty the King of the United Kingdom of Great Britain and Ireland and of the British Dominions beyond the Seas, Emperor of India:

The Most Honourable the Marquess Curzon of Kedleston, K.G., His Majesty's Principal Secretary of State for Foreign Affairs;

The Honourable William Stevens Fielding, a Member of His Majesty's Honourable Privy Council for Canada, a Member of the Parliament of Canada, Minister of Finance and Receiver General of Canada;

The Honourable Ernest Lapointe, a Member of His Majesty's Honourable Privy Council for Canada, a Member of the Parliament of Canada, Minister of Marine and Fisheries of Canada;

And His Majesty the King of Italy:

Signor Gabriele Preziosi, Chevalier of the Order of St. Maurice and St. Lazarus and of the Crown of Italy, Chargé d'Affaires of His Majesty the King of Italy at London;

Who, after communicating to each other their respective full powers, found in good and due form, have agreed upon the following Articles: —

Sua Maestà il Re d'Italia a Sua Maestà il Re del Regno Unito della Gran Bretagna e Irlanda e dei Dominii inglesi d'oltremare, Imperatore dele Indie, desiderosi di estendere e facilitare le relazioni Commerciali fra l'Italia e il Canada, hanno determinato di concludere una Convenzione per questo scopo, ed hanno nominato i loro rispettivi Plenipotenziari, cioè:

Sua Maestà il Re d'Italia:

Il Signor Gabriele Preziosi, Cavaliere dell'Ordine dei SS. Maurizio e Lazzaro e della Corona d'Italia, Incaricato d'Affari di Sua Maestà il Re d'Italia in Londra; e

Sua Maestà il Re del Regno Unito della Gran Bretagna e Irlanda e die Dominii Inglesi d'oltremare, Imperatore delle Indie:

Il molto Onorevole Marchese Curzon di Kedleston, K.G., principale Segretario di Stato per gli Affari Esteri di Sua Maestà Britannica;

L'On. William Stevens Fielding, Membro del Consiglio Privato di Sua Maestà il Re per il Canada, Membro del Parlamento del Canada, Ministro delle Finanze e Ricevitore Generale del Canada;

L'On. Ernest Lapointe, Membro dell'On. Conciglio Privato di Sua Maestà il Re per il Canada, Membro del Parlamento del Canada, Ministro della Marina e della Pesca del Canada;

I quali, dopo essersi reciprocamente communicati i loro rispettivi pieni poteri, riconomsciuti in buona e debita forma, convennero nella stipulazione dei seguenti articoli:

Article 1.

Articles the produce or manufacture of Canada imported into Italy and articles the produce or manufacture of Italy imported into Canada shall not be subjected to other or higher duties or charges than those paid on the like articles the produce or manufacture of any other foreign country. Nor shall any prohibition or restriction be maintained or imposed on the importation of any article the produce or manufacture of Canada into Italy, or of any articles the produce or manufacture of Italy into Canada which shall not equally extend to the importation of like articles being the produce or manufacture of any other foreign country. This last provision is not applicable to the sanitary and other prohibitions occasioned by the necessity of protecting the safety of persons or of cattle, or of plants useful to agriculture.

Article 2.

Articles the produce or manufacture of Canada exported to Italy and articles the produce or manufacture of Italy exported to Canada shall not be subjected to other or higher duties or charges than those paid on the like articles exported to any other foreign country. Nor shall any prohibition or restriction be imposed on the exportation of any article from Canada to Italy or from Italy to Canada which shall not equally extend to the exportation of the like articles to any other foreign country.

Article 3.

Articles the produce or manufacture of Canada passing in transit through Italy and articles the produce or manufacture of Italy passing in transit through Canada shall be reciprocally free from all transit duties whether they pass through direct or whether during transit they are unloaded, warehoused or reloaded.

Articolo 1.

A qualsiasi prodotto del suolo o dell'industria dell'Italia importato nel Canada ed a qualsiasi prodotto del suolo o dell'industria del Canada importota in Italia, non saranno imposti diritti o gravami diversi o maggiori di quelli imposti su simili prodotti del suolo o dell'industria di qualsiasi altor Paese straniero; nè alcuna proibizione o restrizione sarà mantenuta o imposta sull-importazione di qualsiasi prodotto del suolo o dell'industria importato dall'Italia nel Canada o di qualsiasi prodotto del suolo o dell'industria importato dal Canada in Italia, senza che essa si estenda egualmente all'importazione degli, eguali prodotti del suolo o dell'industria di quasiasi altro Paese. Quest'ultima disposizione non è applicabile alle proibizioni sanitarie ed altre reclamate dalla necessità di tutelare l'incolumità delle persone, o del bestiame, o di piante utili all'agricultura.

Articolo 2.

A qualsiasi prodotto del suolo o dell'industria dell'Italia a destinazione del Canada ed a qualsiasi prodotto del suolo o dell'industria del Canada a destinazione dell'Italia non saranuo imposti diritti o gravami diversi o maggiori di quelli che si esigono sull'eguale prodotto a destinazione di qualsiasi altro Paese straniero; nè alcun divieto o restrizione serà imposto all'esportazione di qualsiasi prodotto dall'Italia a destinazione del Canada o dal Canada a destinazione dell'Italia, che non debba estendersi egualmente all'esportazione degli eguali prodotti a destinazione di qualsiasi altro Paese straniero.

Articolo 3.

Qualsiasi prodotto del suolo o dell'industria dell'Italia che passi in transito attraverso il Canada et qualsiasi prodotto del suolo o dell'Industria del Canada che passi in transito attraverso l'Italia, saranno reciprocamente esenti da qualunque tassa di transito, sia che il passaggio avvenga directtamente, sia che durante il transito i prodotti suddetti siano scaricati, messi a magazzino o ricaricati.

ARTICLE 4.

It is understood that in all matters governing the import, export and transit of merchandise Italy grants to Canada and Canada grants to Italy the treatment of the most favoured nation.

ARTICOLO 4.

E inteso che in tutti i casi riferentisi all'importazione, all'esportazione o al transito di merci, il Canada concede all'Italia e l'Italia concede al Canada il trattamento della Nazione più favorita.

ARTICLE 5.

The name " Italy " wherever used in this Convention shall be held to include the Colonies and Possessions of Italy.

The present convention, after being approved by the Parliament of Canada and by the competent authority on the part of Italy shall be ratified and the ratifications shall be exchanged at London as soon as possible. It shall come into force immediately upon ratification and shall be binding upon the Contracting Parties during four years from the date of its coming into force. In case neither of the Contracting Parties shall have given notice to the other twelve months before the expiration of the said period of four years of its intention to terminate the present Convention it shall remain in force until the expiration of one year from the date on which either of the Contracting Parties shall have given to the other notice of its intention to terminate it.

In witness whereof the respective Plenipotentiaries have signed this Convention in the English and the Italian languages and haxe affixed thereto their seals.

Done at London, this 4th day of January in the year 1923.

ARTICOLO 5.

La parola " Italia " ogni qualvolta usata in questa Convenzione dovrà intendersi includa anche la Colonie ed i Possedimenti dell'Italia.

La presente Convenzione, dopo essere stata approvata dal Parlamento Canadese e della competente Autorità Italiana, sarà ratificata e le ratifiche relative verranno scambiate a Londra quanto primo possibile. Essa entrerà in vigore immediatamente dopo la ratifica e vincolerà le Parti Contraenti per quattro anni dalla data della sua entrata in vigore. Quālora allo spirare del detto termine nessuna delle due Parti Contraenti avesse notificato all'altra, con preavviso di dodici mesi, la sua intenzionedi fer cessare la presente Convenzione, questa continuerà in rimanere in vigore fino allo spirare di un anno della data alla quale una delle due Parti avesse notificato all'altra la sua intenzione di cessarla.

In fede di che i Plenipotenziari delle Uarti Contraenti hanno firmato la presente Convenzione in lingua italiana ed inglese e vi hanno apposto i loro rispettivi sigilli.

Fatto a Londra, il 4 di Gennaio millenovecentoventitre.

[L.S.] CURSON OF KEDLESTON.

[L.S.] W. S. FIELDING,

[L.S.] ERNEST LAPOINTE,

[L.S.] GABRIELE PREZIOSI.

GEORGE, *R.I.*

GEORGE, par la grâce de Dieu, Roi du Royaume-Uni de la Grande-Bretagne et d'Irlande et des Possessions britanniques au delà des mers, Défenseur de la foi, Empereur des Indes, etc., etc., etc.

A tous et chacun présents et à venir, salut!

Attendu que, pour mieux traiter et arranger certaines matières qui sont maintenant à l'étude ou qui peuvent devenir sujets à discussion, entre Nous et Notre bon frère le Roi d'Italie, concernant les relations commerciales entre l'Italie et le Canada, Nous avons cru bon de revêtir de plein pouvoir des personnes aptes à diriger pour Notre part ladite discussion. Sachez, donc, que Nous, plein de foi et confiance en la sagesse, loyauté, diligence et circonspection de Notre fidèle et bien-aimé l'honorable William Stevens Fielding, membre du Parlement du Canada, membre de Notre Conseil privé pour le Canada, ministre des Finances de Notre Dominion du Canada; et de Notre fidèle et bien-aimé l'honorable Ernest Lapointe, l'un de nos Conseils doctes en loi, membre du Parlement du Canada, membre de Notre Conseil privé pour le Canada, ministre de la Marine et des Pêcheries de Notre Dominion du Canada, les avons nommés, faits, constitués et désignés, comme par les présentes les nommons, faisons, constituons et désignons Nos autorisés Commissaires, Procureurs et Plénipotentiaires; les revêtant de plein pouvoir et autorité pour traiter, ajuster et conclure avec tel ministre ou ministres qui peut être revêtu de semblable pouvoir et autorité de la part de Notre bon frère le Roi d'Italie, tout traité, convention ou accord de nature à atteindre le but susmentionné et, pour signer pour Nous et en Notre nom, toute chose ainsi convenue et conclue, et faire et transiger toutes pareilles autres choses pouvant s'y rapporter, avec autant de latitude quant à la manière et la forme, et avec autant de force et d'efficacité que Nous pourrions Nous-même le faire, si présent Nous étions: Nous engageant et promettant, sur Notre parole royale, que, quelles que soient les choses qui seront ainsi transigées et conclues par Nos dits commissaires, Procureurs et Plénipotentiaires, elles seront, subordonnément à Notre ratification, si nécessaire, convenues, reconnues et acceptées par Nous, sans la moindre réserve, et qu'en autant qu'il sera en Notre pouvoir Nous ne souffrirons jamais qu'aucune personne y porte atteinte, soit en totalité, soit en partie, ou agisse contrairement à ces choses.

EN FOI DE QUOI, Nous avons fait apposer le grand sceau de Notre Royaume-Uni de Grande-Bretagne et d'Irlande aux présentes que Nous avons signées de Notre seing royal.

Donné en Notre Cour de St. James, le douzième jour de décembre, en l'année de Notre-Seigneur, mil neuf cent vingt-deux et de Notre règne la treizième.

[SCEAU.]

SA MAJESTE, le Roi du Royaume-Uni de Grande-Bretagne et d'Irlande et des Possessions britanniques au delà des mers, Empereur des Indes, et Sa Majesté, le Roi d'Italie, voulant améliorer et étendre les relations commerciales entre l'Italie et le Canada ont résolu de conclure une Convention à cette fin et nommé pour être leurs Plénipotentiaires respectifs, savoir:

Sa Majesté, le Roi du Royaume-Uni de Grande-Bretagne et d'Irlande et des Possessions britanniques au delà des mers, Empereur des Indes:

Le très honorable le Marquis Curzon de Kedleston, Chevalier de l'Ordre de la Jarretière, de Sa Majesté le secrétaire principal, Secrétaire d'Etat aux Affaires étrangères;

L'honorable William Stevens Fielding, membre de l'honorable Conseil privé de Sa Majesté pour le Canada, membre du Parlement du Canada, ministre des Finances et Receveur général du Canada;

L'honorable Ernest Lapointe, membre de l'honorable Conseil privé de Sa Majesté pour le Canada, membre du Parlement du Canada, ministre de la Marine et des Pêcheries du Canada;

Et Sa Majesté le Roi d'Italie:

Signor Gabriele Preziosi, Chevalier de l'Ordre de Saint-Maurice et de Saint-Lazare et de la Couronne d'Italie, Chargé d'Affaires à Londres de Sa Majesté le Roi d'Italie;

Lesquels, après s'être communiqué leurs pleins pouvoirs respectifs trouvés en bonne et due forme, sont convenus des articles suivants:

ARTICLE 1.

Les produits naturels ou fabriqués du Canada importés en Italie, et les produits naturels ou fabriqués d'Italie importés au Canada ne seront soumis à des droits ou taxes autres ou plus élevés que ceux appliqués aux produits naturels ou fabriqués similaires d'un autre pays étranger quelconque. Il ne sera par ailleurs maintenu ou imposé aucune prohibition ou restriction d'importation du Canada en Italie sur aucun produit naturel ou fabriqué, ou sur tout produit naturel ou fabriqué importé de l'Italie au Canada qui ne soit applicable en même temps à l'importation de produits naturels ou fabriqués similaires provenant de tout autre pays étranger. Cette dernière disposition ne s'applique pas à d'autres prohibitions d'ordre sanitaire que nécessite la protection des personnes ou des bestiaux ou des plantes utiles à l'agriculture.

ARTICLE 2.

Les produits naturels ou fabriqués du Canada exportés en Italie et les produits naturels ou fabriqués d'Italie exportés au Canada ne seront pas assujettis à des droits ou taxes autres ou plus élevés que ceux imposés sur des articles similaires exportés à tout autre pays étranger. Il ne sera imposé aucune prohibition ou restriction sur l'importation d'aucun article du Canada en Italie, ou d'Italie au Canada qui ne soit en même temps applicable à l'exportation d'articles similaires à tout autre pays étranger.

ARTICLE 3.

Les produits naturels ou fabriqués du Canada en transit par l'Italie, et les produits naturels ou fabriqués d'Italie en transit au Canada seront réciproquement exempts de tous droits de transit, soit qu'ils passent directement, soit que, en cours de transit, ils soient transbordés, entreposés ou rechargés.

ARTICLE 4.

Il est entendu qu'en ce qui règle l'importation, l'exportation et le transit des marchandises, l'Italie accorde au Canada et le Canada à l'Italie le traitement de la nation la plus favorisée.

ARTICLE 5.

Le nom "Italie", chaque fois que mentionné en cette Convention, comprendra les Colonies et les Possessions de l'Italie.

La présente Convention, après son approbation par le Parlement du Canada et par l'autorité compétente de la part de l'Italie, sera ratifiée et les ratifications seront échangées à Londres aussitôt que possible. Elle entrera en vigueur dès qu'elle aura été ratifiée et engagera les Parties Contractantes durant quatre années à partir de son entrée en vigueur. Si ni l'une ni l'autre des Parties Contractantes n'a notifié l'autre, douze mois avant l'expiration de ladite période de quatre années, de son intention de mettre fin à la présente Convention, celle-ci devra rester en vigueur jusqu'à expiration d'une année à partir de la date à laquelle l'une ou l'autre des Parties Contractantes aura signifié à l'autre son intention de la terminer.

En foi de quoi les Plénipotentiaires respectifs ont signé cette Convention en langues anglaise et italienne et y ont apposé leurs sceaux.

Donné à Londres ce 4e jour de janvier en l'année 1923.

STILL LOWER ITALIAN CUSTOMS DUTIES ON FLOUR

TRADE COMMISSIONER W. MCL. CLARKE

Milan, January 24, 1923.—The Facisti Government in Italy apparently believe that the essential items entering into the everyday consumption of all classes of the people should be as low in cost as possible, and to this end has again modified the customs duties on flour by a royal decree of January 18, which supersedes the earlier decree of December 16 of last year, to which reference was made in *Commercial Intelligence Journal* No. 989. The Government has now practically removed the tariff on flour and has taken a very important step in the direction of freer trade. The Italian millers stand to lose, but the common people stand to gain, and hence in these days of high living costs the measure is extremely popular. Several Canadian exporters of flour have endeavoured on many occasion to enter the Italian market, and now at last is presented a very unexpected opportunity. Moreover, as the duties on macaroni and similar flour products are considerably reduced by the latest decree of January 18, it may be found practical for Canadian manufacturers of these food products to sell Canadian macaroni and spaghetti in the home of macaroni and spaghetti. This office will be pleased to receive full export particulars from Canadian firms who may be interested in the Italian flour and "pasta" trades.

For purposes of information the new customs duties are set out hereunder:—

	Old Tariff (July, 1921) Gold Lire	New Duties (Dec. 16, 1922) Gold Lire	Present Duties (Jan. 18, 1923) Gold Lire
Wheat flour	11.50	4	1.50
Rye flour	6.50	2	1.35
Oat flour	6.	2	1.35
Maize flour	3.15	2.	1.35
Semolina	15.50	15.50	3.50
Macaroni and similar pastes	16.	16.	4.
Bread and ships' biscuits	16.	16.	5.50
Bran	2.	2.	0.60

TRADE COMMISSIONER B. S. WEBB'S FORTHCOMING VISIT TO CANADA

Mr. B. S. Webb, Canadian Trade Commissioner in Buenos Aires, is expected to arrive in Canada in the early part of March with a view to undertaking a business tour of the Dominion. Canadian firms who desire to be brought in touch with Mr. Webb, or to interview him, are requested to communicate with the Director, Commercial Intelligence Service, Ottawa.

EXTENSION COURSE IN EXPORT TRADE

The Extension Course in Export Trade, which was announced to be held at l'Ecole des Hautes Etudes Commerciales, Montreal, begins on Monday, February 19, and extends for a period of two weeks. The Course is divided into two parts, the first consisting of lectures, in French, by the professors of l'Ecole des Hautes Etudes, and the second of lectures, in English, by officers of the Department of Trade and Commerce. These lectures will be accompanied by demonstrations, followed by discussions.

Applications for the above course should be made to the Director of l'Ecole des Hautes Etudes Commerciales, 399 Avenue Viger, Montreal.

BUSINESS AND FINANCIAL CONDITIONS IN AUSTRALIA

Mr. D. H. Ross, Canadian Trade Commissioner in Melbourne, Australia, sends under date of February 12, 1923, the following cable descriptive of business and financial conditions in Australia:—

"New Commonwealth Government, comprising coalition of Nationalists, Country Party and Liberals, is holding first cabinet meeting to-day. Imports for six months ending December were 65,649,296 pounds, being an increase over corresponding period of 1921 of 21,253,251 pounds. The chief expansion was in dry goods, piece goods and apparel, which aggregated 25,240,419 pounds, and showing a net increase of 11,657,125 pounds. Metal and machinery increased by 3,340,000 pounds, rubber and leather 612,278 pounds, paper 250,553 pounds. For the six months ending December, 168,120 bales of old wool were sold; new wool sales comprised 836,740 bales—an aggregation of 1,004,760 bales, showing a net increase of 133,259 bales as compared with corresponding period in 1921. Arrangement made for sale of wool for year ending June next will realize approximately £37,000,000. Some large sales were made in Adelaide for wheat and flour for February-March shipment to South Africa. Market now depressed. Wheat nominally 5s. 3½d.; flour about £11 in 150-pound sacks free aboard. Wheat exportable surplus this season is estimated to exceed 40 million bushels, which is expected to realize 10 and 11 million pounds sterling. Since opening of year, distinct revival in trade. Climatic and trading conditions are generally favourable."

EXPORTS FROM CANADA TO THE UNITED STATES OF PRINCIPAL COMMODITIES SUCH AS ARE PRODUCED ON CANADIAN FARMS, OR MANUFACTURED DIRECTLY FROM SUCH FARM PRODUCTS, DURING THE MONTH AND FOUR MONTHS ENDED JANUARY, 1920 to 1923; WITH UNITED STATES TARIFF RATES IN FORCE.

(COMPILED BY THE EXTERNAL TRADE BRANCH, DOMINION BUREAU OF STATISTICS)

Commodities		Month of January				Four Months ended January				United States Tariff Rates in force		
		1920	1921	1922	1923	1920	1921	1922	1923	Prior to May 27, 1921	From May 27, 1921 to Sept. 21, 1922	Subsequent to Sept. 21 1922
Animals (except for Improvement of Stock)—												
Cattle	No.	21,162	11,166	4,188	5,155	286,055	164,437	104,363	98,212			
	$	1,755,029	807,290	117,490	171,821	25,702,952	12,546,168	1,923,508	2,696,016	Free	30 p.c.	(a)
Horses	No.	235	223	302	67	1,002	952	872	598			
	$	44,816	40,324	60,770	13,080	174,379	247,864	171,687	85,720	10 p.c.	10 p.c.	(b)
Poultry	No.	29,816	41,079	35,560	36,519	465,556	525,784	532,555	387,059			
	$	31,621	48,171	39,393	32,000	477,585	591,497	529,526	375,670	1c. per lb.	1c. per lb.	3c. per lb.
Sheep	No.	9,479	14,747	2,200	13	133,615	119,957	43,357	28,830			
	$	123,156	142,175	13,619	148	1,410,122	1,080,131	223,460	187,609	Free	(c)	$2 per head
Fruits—												
Apples, green or ripe	Brl.	21,709	888	5,199	1,153	165,284	11,011	392,360	61,234			
	$	54,685	5,619	15,874	6,269	635,905	53,822	1,999,472	286,071	10c. per bush.	30c. per bush.	25c. per bush.
Apples, dried	Lb.	106,309	....	13,094	29,200	262,936	....	631,254	29,200			
	$	21,986	....	1,690	2,920	50,400	....	73,342	2,920	1c. per lb.	1c. per lb.	2c. per lb.
Berries, fresh	$	....	1,980	8,953	2,722	31,092	25,522	39,403	52,016	½c. per qt.	½c. per qt.	1c. per lb.
Grains—												
Barley	Bush.	37,447	....	1,351	....	38,911	128	1,351	936,623			
	$	46,829	....	878	....	49,011	128	878	497,645	15c. per bush.	15c. per bush.	20c. per bush.
Beans	Bush.	1,876	696	633	18,570	2,722	1,053	3,267	38,081			
	$	9,987	2,053	2,874	59,467	12,879	4,017	9,611	110,155	25c. per bush.	$1.20 per bush	$1.05 per bush.
Buckwheat	Bush.	24,052	56,314	14,718	25,812	38,588	135,159	68,082	157,982			
	$	33,140	63,207	11,952	21,880	55,028	156,485	53,696	129,761	Free	Free	10c. per cwt.
Oats	Bush.	300,516	179,882	185,946	21,513	1,161,588	389,228	1,015,534	137,497			
	$	245,995	111,134	94,131	14,051	966,230	257,265	463,080	71,005	6c. per bush.	6c. per bush.	15c. per bush.
Pease, whole	Bush.	5,061	10,439	12,220	28,394	31,531	22,509	68,259	93,562			
	$	29,336	62,703	33,713	95,212	198,379	138,752	211,271	215,160	10c. per bush.	10c. per bush.	60c. per bush.
Pease, split	Bush.	1,660	....	890	....	4,520	....	14,372	2,067			
	$	6,254	....	2,895	....	14,422	....	53,892	7,017	20c. per bush.	20c. per bush.	75c. per bush.
Rye	Bush.	82,290	14,424	5,549	1,350	318,431	258,059	74,521	436,065			
	$	134,740	22,683	4,658	1,148	460,767	424,301	60,937	334,385	Free	Free	15c. per bush.
Wheat	Bush.	261,678	4,049,702	21,476	44,843	1,891,161	33,219,658	9,193,631	8,716,326			
	$	691,010	7,715,595	27,167	44,295	4,271,703	73,194,213	10,287,406	9,384,470	Free	35c. per bush.	30c. per bush.
Grain Products—												
Bran, shorts and middlings	Cwt.	12,038	94,679	17,591	184,625	264,293	507,875	259,210	1,129,007			
	$	28,053	148,355	21,865	220,750	595,537	918,987	253,333	1,224,842	10 p.c. or Free	10 p.c. or Free	15 p.c.
Wheat Flour	Brl.	7,376	174,846	55,564	49,190	9,867	696,323	281,767	239,068			
	$	84,397	1,630,537	313,214	305,237	111,913	7,353,838	1,724,931	1,397,521	Free	20 p.c.	78c. per cwt.
Meats—												
Bacon, hams, shoulders and sides	Cwt.	150	124	131	161	4,866	1,082	481	459			
	$	6,850	6,106	3,876	5,167	128,324	44,927	15,096	15,618	Free	25 p.c.	2c. per lb.
Beef, fresh, chilled or frozen	Cwt.	32,849	20,977	3,240	3,200	153,587	119,291	98,406	77,347			
	$	574,387	320,784	33,131	27,419	2,429,906	1,734,363	1,035,756	907,786	Free	2c. per lb.	3c. per lb.

Mutton and lamb, fresh, chilled or frozen	Cwt.	5,768	883	4,952	7	26,999	39,955	49,769	12,098			
	$	134,317	22,506	95,404	112	581,333	1,019,867	836,851	294,304	Free	2c. per lb.	(d)
Pork, fresh, chilled or frozen	Cwt.	464	484	1,127	477	3,798	4,155	3,603	2,354			
	$	12,848	17,916	20,006	9,568	82,979	154,065	87,929	64,054	Free	2c. per lb.	¾c. per lb.
Pork, dry-salted and pickled	Cwt.	1,866	...	325	...	3,144	622	325	5			
	$	41,427	...	1,800	...	77,182	9,795	1,809	99	Free	25 p.c.	2c. per lb.
Poultry, dressed or undressed	$	9,268	75,870	52,757	58,441	42,301	434,822	664,270	463,496	2c. per lb.	2c. per lb.	6c. per lb.
Other meats, including canned meats, but excluding extracts	Cwt.	899	1,082	428	480	14,573	7,786	3,869	2,976			
	$	16,921	15,797	3,831	10,054	198,499	122,083	38,498	59,674	Free	25 p.c.	20 p.c.
Milk and milk products—												
Butter	Lb.	28,733	38,395	185,828	491,466	4,134,512	1,478,003	2,487,321	2,146,499			
	$	14,957	18,928	68,457	194,553	2,300,309	741,726	924,650	889,884	2½c. per lb.	6c. per lb.	8c. per lb.
Cheese	Lb.	74,602	5,771	81,553	22,000	3,031,624	100,510	2,529,465	1,952,800			
	$	21,128	2,504	13,826	4,863	796,199	29,870	386,079	365,872	20 p.c.	23 p.c.	(e)
Cream	Gal.	19,833	27,498	222,094	71,784	200,335	333,746	605,503	432,496			
	$	31,760	40,970	317,732	149,331	338,662	543,878	893,875	794,187	Free	5c. per gal.	20c. per gal.
Milk, fresh	Gal.	120,850	68,502	70,696	86,498	762,263	384,629	454,843	322,197			
	$	39,925	21,057	17,603	21,155	237,057	124,329	106,530	72,497	Free	2c. per gal.	2½c. per gal.
Milk, condensed, including milk powder	Lb.	1,576,597	154,336	49,542	1,012,675	3,857,146	2,855,035	88,257	4,389,527			
	$	252,644	47,019	9,007	125,130	636,349	454,659	16,884	560,310	Free	2c. per lb.	1c.—1½c. lb.
Seeds—												
Clover seed, alsike	Bush.	14,354	10,388	12,422	5,964	68,937	18,543	51,954	22,269			
	$	362,672	127,027	109,199	40,997	1,755,242	236,814	464,541	150,198	Free	Free	4c. per lb.
Clover seed, alfalfa and red	Bush.	62	952	699	12	2,122	955	1,052	12			
	$	1,774	9,428	5,043	175	57,229	9,473	8,991	175	Free	Free	4c. per lb.
Clover seed, other	Bush.	15,894	3,605	5,706	7,263	36,529	5,128	9,706	34,421			
	$	291,024	19,028	12,044	39,936	622,072	29,711	28,053	166,217	Free	Free	(f)
Flaxseed	Bush.	35,517	127,912	6,468	76,311	256,621	795,928	1,350,459	1,267,936			
	$	170,900	266,238	10,819	161,991	1,225,313	1,677,908	2,517,668	2,639,128	20c. per bush.	30c. per bush.	40c. per bush.
Grass seed	Bush.	4,192	9,336	4,633	9,605	18,674	32,584	44,211	33,976			
	$	22,677	19,942	19,475	18,134	67,211	67,389	183,187	64,657	Free	Free	2c. per lb.
Vegetables—												
Potatoes	Bush.	433,776	229,421	213,823	10,358	2,661,284	1,328,360	556,785	196,995			
	$	685,028	174,618	149,217	6,806	3,065,070	1,190,195	478,983	161,789	Free	25c. per bush.	50c. per cwt.
Sugar beets	Ton.	1,010	2,074	190	...	7,723	11,502	10,481	11,430			
	$	9,090	18,511	1,140	...	70,235	103,175	63,151	56,730	5 p.c.	5 p.c.	80c. per ton
Turnips	Bush.	243,322	255,612	239,449	293,466	1,546,072	1,327,471	1,316,331	1,459,138			
	$	130,296	66,973	60,678	37,856	654,252	319,822	351,325	204,856	15 p.c.	15 p.c.	12c. per cwt.
Miscellaneous Products—												
Eggs	Doz.	10,012	18,460	472	1,452	69,010	132,938	110,227	70,311			
	$	6,464	10,702	245	538	43,493	86,982	53,063	29,912	Free	Free	8c. per doz.
Hay	Ton	23,788	6,834	174	1,177	69,478	37,228	534	3,975			
	$	392,673	151,709	4,426	12,091	1,119,304	841,690	11,908	43,367	$2 per ton	$2 per ton	$4 per ton
Maple sugar	Lb.	226,809	176,708	119,556	9,395	711,510	906,875	1,013,502	114,746			
	$	65,601	39,120	8,624	2,631	207,415	226,842	73,244	26,720	3c. per lb.	3c. per lb.	4c. per lb.
Tallow	Cwt.	2,248	1,035	2,095	736	17,092	6,113	8,138	2,694			
	$	38,105	5,921	11,848	5,426	269,416	47,895	45,042	18,894	Free	Free	½c. per lb.
Wool	Lb.	708,966	1,544,502	...	728,561	2,185,005	4,564,601	107,455	3,548,114			
	$	395,263	354,757	...	226,634	1,318,793	1,101,444	10,614	1,086,653	Free	(g)	(g)
Total value of above commodities	$	7,069,033	12,655,257	1,801,324	2,150,008	53,542,449	108,346,714	27,377,430	26,195,060			

(a) Cattle weighing less than 1,050 pounds, 1½c. per lb.; 1,050 pounds or over, 2c. per lb. (b) Horses valued at not more than $150 each, $30 per head; more than $150 each, 20 per cent. (c) Sheep, one year old or over, $2 per head; less than one year old, $1 per head. (d) Mutton fresh, 2½c. per lb.; lamb, fresh, 4c. per lb. (e) Cheese, 5c. per lb. but not less than 25 per cent (f) Clover seed, crimson, 1c. per lb; white, 3c. per lb. and other, 2c. per lb. (g) Dutiable at various rates. See *Commercial Intelligence Journal* No. 974, Sept. 30, 1922, pages 516-7.

THE MARKET IN ITALY FOR WOOD-PULP

Trade Commissioner W. McL. Clarke

Milan, January 23, 1923.—Not only is papermaking one of Italy's foremost industries, but this manufacture bids to become increasingly more important in the next few years. In 1913 there were some 169 Fourdrinier and 220 cylinder machines at work in Italy, and although very few plants have been laid down since pre-war days, some of the largest paper mills are now negotiating for the purchase of new installations. Italy, it is true, is not independent of foreign paper supplies, as has been pointed out by the writer in a recent report, but at the same time the country produces a considerable quantity of paper products and even exports to Latin America, Egypt, and the Levant.

Now this Italian paper manufacture may largely be described as an artificial industry, inasmuch as the country has had to buy abroad the greater part of its raw materials for the making of paper. Chemical wood-pulp, machinery and supplies, fuel and chemicals in pre-war days were practically all imported, and only in mechanical wood-pulp was the country able to meet the major part of its requirements. These conditions still largely persist, and the purpose of this report is to call attention to the openings in Italy for Canadian wood-pulp.

MECHANICAL WOOD-PULP

It is calculated that the Italian paper industry at present uses about 70,000 metric tons of mechanical wood-pulp per year, and of this amount some 60,000 metric tons are produced locally. This is a gain of some 20,000 metric tons on the pre-war consumption. What mechanical wool-pulp comes into Italy is mostly obtained from the nearby Austrian territory, and the writer does not consider that these purchases, given the proximity of Austria and the distance of Canada, merit a Canadian effort.

CHEMICAL WOOD-PULP

As regards chemical wood-pulp, however, the inference is exactly the reverse. In the first place, chemical wood-pulp production in Italy is virtually negligible. The consumption of chemical wood-pulp, in other words, about equals the quantities imported from abroad. There are only two establishments in Italy, where very small quantities are made, and these plants are connected with the self-same worked paper mills. As a matter of fact, even this cellulose is neither soda nor bisulphite, but is manufactured with the chemical, chlorine, with either straw, hemp fibre or sparta grass as the basis. The dependence of Italian paper makers on foreign sources of supply for chemical wood-pulp was clearly reflected during the war, when imports fell off to one-fifth of their normal level, and when the daily newspaper, for example, appeared four times a week in the form of a single sheet. Rags, waste paper, and more mechanical wood-pulp were utilized, but the country could not turn out an extra roll of the chemical pulp. Not only this, but so far as the writer can ascertain from authoritative sources, there is little likelihood of Italy building up an important cellulose industry in the near future. The tendency is rather at present to expand the establishments of mechanical wood-pulp and paper interests are urging the extended cultivation of the Canadian poplar tree to this end. It would appear therefore that the opening for chemical wood-pulp need not be considered as temporary but that the market will continue to exist.

MINIMUM AND MAXIMUM REQUIREMENTS

What then in approximate figures are the country's requirements of chemical wood-pulp? In 1913, some 86,000 metric tons were imported; in 1920, about 60,000 metric tons; and in 1921, about 37,000 metric tons. Between these two extremes it is evident there is a wide gap, and even the 1920 imports vary considerably from those of the other years. The Government trade statistics for the first six months of 1922, which have just been published, show, however, that during this period about 34,000 metric tons were imported, and if we multiply by two we would expect that the entire imports of last year should total about 68,000 metric tons, which estimate is nearer the 1913 imports than any year since the war. From inquiries made, however, it would appear that the imports for the last six months of 1922 will be larger than for the first six months and, if this estimate is eventually confirmed, the 1922 imports will be still nearer the 1913 imports, and will probably reach at least 75,000 or 80,000 metric tons.

To put the matter briefly, the writer would be inclined to think that, leaving out of consideration abnormal years, the chemical wood-pulp requirements of Italy may now be placed at a minimum of 75,000 tons and at a present maximum of 85,000 metric tons. It might, however, be added that the writer is further of the opinion, formed after various local interviews, that the present maximum leaves but little margin and that a not distant maximum will reach 100,000 metric tons per year.

COUNTRIES OF ORIGIN

In 1913, of the 86,000 metric tons of chemical wood-pulp imported into Italy, Germany supplied 38 per cent, Austria 37 per cent, and Norway 17 per cent, with smaller contributions principally from Sweden, Switzerland, and Roumania. When these percentages are compared with the corresponding ones of the first half of 1922 there is not noticed much change in the general direction of the trade. From January to June, 1922, some 34,000 metric tons were imported, and of this quantity Germany furnished 33 per cent, Austria 19 per cent, Czecho-Slovakia 11 per cent (i.e. old Austria 30 per cent), Sweden 24 per cent, Norway 6 per cent, while the rest, or 7 per cent, came forward from Switzerland, Holland, Jugo-Slavia, Canada, and Belgium. To generalize then, we find that Italy's principal sources of wood-pulp supply have been up till now Central Europe and Scandinavia. It is significant, however, that whereas Canada is credited with no chemical wood-pulp in 1913, some 205 tons are shown as coming from Canada during the first six months of last year. In fact, since 1920, small shipments of wood-pulp have occasionally been made from Canada to Italy, and now that a beginning has been made it would seem worth while to endeavour to cater permanently to this market. We should push on a little further every year, if at all practical, and not make retrograde steps once we have gone forward in this specific export to Italy.

THE KINDS OF CHEMICAL WOOD-PULP REQUIRED

The Italian market calls for bleached bisulphite, unbleached bisulphite, easy bleaching bisulphite, strong soda kraft, bleached soda, and easy bleaching soda. The degrees of dryness which the papermakers insist upon having is 88 to 90 per cent.

[A clear idea of the kinds of wood-pulp required and present ruling c.i.f. prices is contained in a price list appended to the original of this report. Copies of such list can be had upon application to the Director, Commercial Intelli-

gence Service (quoting file No. T.C. 3-115), and shows country of origin, quality, prices, and degree of dryness for varieties of wood-pulp imported by one of the largest wood-pulp importing firms in Italy.]

PACKING OF CHEMICAL WOOD-PULP

Chemical wood-pulp in sheets is as a rule preferred in Italy to cellulose in rolls. The parcels come forward from Germany and Scandinavia in weights of one or two quintals. Only the finer qualities are packed in jute or cloth coverings, the other grades being protected with sheets of cellulose and bound with iron wire.

TERMS OF PAYMENT AND TARIFF

The usual terms of payment for imported wood-pulp is thirty days with 2 per cent discount. The Italian customs duties on chemical wood-pulp are 20 gold lire per metric ton.

STATISTICAL IMPORTS

The most recent imports of chemical wood-pulp into Italy are reproduced hereunder:—

January-June, 1922

Country of Origin	Metric tons
Austria	6,515
Belgium	20
Czecho-Slovakia	4,065
Germany	11,265
Norway	2,121
Holland	291
Jugo-Slavia	294
Sweden	8,370
Switzerland	716
Canada	205
Other countries	200
	34,062

Although some Canadian wood-pulp business has been done in Italy, it does not bulk up largely, and although many Canadian firms have been approached by Italian importers, the results so far have not been permanent, nor entirely satisfactory. It may be, however, that our prices, even with a disadvantageous exchange rate, will not be beyond limits of Scandinavian competition, and that a new initiative will bring business. Apart from the paper industry, there is an important artificial silk industry in Italy, and this combined market, the writer believes, merits Canadian attention. In case of interest, this office will be pleased to receive small samples, specifications, and c.i.f. prices Genoa, which together will be of assistance in endeavouring to introduce Canadian exporters of wood-pulp to the leading importers here.

WORLD'S SUGAR CROP

The estimate for the world's total sugar crop for the present year is given at 18,056,000 tons, which is 390,000 tons more than last year's crop, says the *Manchester Guardian Commercial*. This year's crop is about equal to the greatest pre-war crop, and is accounted for by the fact that what is lost from Europe has been gained in Cuba. The stock of old crop in Cuba is about 1,000,000 tons less than last year, but this 1,000,000 tons has not necessarily gone into consumption, and goes to form the invisible supply. Unless there is an increased demand from the manufacturing trades there will be an abundant supply of sugar. The lack of demand from the United Kingdom, however, may be levelled by the increasing demand from America.

IMPORTS OF ASBESTOS INTO GERMANY

Trade Commissioner L. D. Wilgress

Hamburg, January 18, 1923.—Asbestos after grain has been the most important article of export from Canada to Germany since the war. During the past year Germany has imported fairly large quantities of Canadian asbestos, but recently there has been a falling off in arrivals owing to the stiffening of prices in Canada and the difficulties arising from the depreciated exchange.

Whereas before the war Canada and Russia supplied the requirements of the German market almost exclusively, Rhodesia is now a formidable competitive source of supply. Although the chemical composition of Rhodesian asbestos is said to be satisfactory, German manufacturers are again beginning to show a marked preference for Canadian asbestos owing to Rhodesian being slightly harder and more brittle. Some inferior grades of asbestos are being received from the Union of South Africa and Australia. During the past year the most notable event has been the reappearance of Russian supplies and fairly large quantities were received from Petrograd during the latter months of the year.

The following table shows the imports of crude asbestos into Hamburg from principal ports of shipment during each month from January to September, 1922:—

IMPORTS OF CRUDE ASBESTOS INTO HAMBURG

Port of shipment	Jan. Bags	Feb. Bags	March Bags	April Bags	May Bags	June Bags	July Bags	Aug. Bags	Sept. Bags	Total
London..	2,101	1.512	9,616	1,932	2,288	1,882	487	4,518	1,182	25,518
Liverpool and Manchester Glasgow and Leith Southampton.. ..	307	712	1,175	364	462	....	1,220	3	....	4,243
Rotterdam and Amsterdam Havre and Antwerp	....	604	784	220	611	142	....	....	....	2,361
New York..	....	99	....	200	1	420	....	....	....	720
Montreal and Portland St. John and Quebec	3,200	8,620	8,700	12,019	17,409	14,088	12,450	5,600	11,340	93,426
Baltimore and Boston Philadelphia	....	....	....	....	4,820	1,000	....	....	....	5,820
Beira and Alagoa Bay . ..	965	1	1,099	1,642	5,975	3,804	....	2,139	2,087	17,712
South Africa	....	....	1,060	....	....	....	206	....	1,213	2,479
Capetown	2,092	1,551	1,851	2,012	165	365	128	1,152	395	9,711
Petrograd and Riga	....	....	....	....	....	....	....	....	21,292	21,292
Various ports.. ..	11	....	473	....	....	....	....	....	100	584
Total from all ports.	8,676	13,099	24,758	18,389	31,731	21,701	14,491	13,412	37,609	183,866

The above figures were supplied through the courtesy of the Hamburg firm of Gebrueder Ritter and Company. The above total import of 183,866 bags

includes roughly (specifications of bill of lading not always correct) the following: crudes and fibres, 173,373 bags; sand, 8,233 bags; recovered and waste, 260 bags.

Bags from Canada average 100 pounds each, while those from Africa average approximately 150 pounds each. The total import into Hamburg during the first nine months of 1922 may therefore be roughly estimated to have been approximately 11,500 tons.

It will be seen from the above table that arrivals from Canada accounted for a large proportion of the total import of asbestos. Receipts of Rhodesian asbestos, while fairly heavy during the first six months of the year, fell off during the period July to September.

IMPORTS OF RUSSIAN ASBESTOS

The first consignment of Russian asbestos to reach Hamburg after the war was received in December, 1921. No further shipment arrived until September, 1922, when 21,292 bags were imported. This was followed by the receipt of 7,122 bags in October and 9,146 bags in November, 1922. The total amount of Russian asbestos imported during 1922 was therefore 37,560 bags or approximately 4,600 tons.

This asbestos was imported by the Russian Soviet Government who endeavoured to sell through its organization in Hamburg direct to consumers against foreign currency. They were only successful in selling a part in this way, and were compelled to seek the assistance of importers in liquidating the remainder. It is understood that all the stocks have not yet been disposed of. The buyers of this Russian asbestos are said to have been chiefly shingle manufacturers in Czecho-Slovakia, Hungary and Austria.

The asbestos imported into Hamburg from Russia was chiefly short fibres, shingle grade, corresponding to Canadian 2x to 2z and testing about 00511. The shipments were mostly from Petrograd, and the markings on the sacks showed signs of having been obliterated. From this and from the general condition of the shipments, it was evident that the asbestos was part of old stocks which are known to have accumulated in Russia during the war. Reports would indicate that little asbestos has been produced in Russia during recent years, although it is believed that attempts are being made to interest American and other foreign capitalists in concessions for working the Russian asbestos mines. The development of asbestos production in Russia is closely followed in Germany, since before the war large supplies were drawn from this source, and Russia was the chief competitor of Canada in the asbestos trade with Germany.

PRESENT MARKET CONDITIONS

The receipt of such large shipments of short fibre stock from Russia during the latter part of 1922 tended to disorganize the trade, but the demand for long fibre asbestos from Canada and Rhodesia continued firm. This is the chief grade of asbestos consumed in Germany, the short fibre shingle asbestos being chiefly imported into Hamburg for sale to manufacturers in Czecho-Slovakia and Hungary. There has been a decrease in the demand for Canadian asbestos during the last two months. This is said to be largely due to the stiffening in prices owing to American buying.

The German manufacturers having become accustomed to a falling market are unable to reconcile themselves to increases in price. At the same time the fall in the value of the mark has made it difficult for the German manufacturer to pay high prices for raw material except for the execution of export orders. The recent collapse of the mark has brought the trade to a standstill, and at

the present there is little demand for asbestos, but this must be regarded as only a temporary phase due to the prevailing uncertainty.

The asbestos trade with Germany since the war has been largely conducted on a consignment basis. The leading Canadian mines are represented by agents, of whom there are three in Hamburg and one in Berlin. These agents receive consignment and sell to the manufacturers who buy only as they require stocks. At times fairly large sums are outstanding to the credit of the Canadian shippers, but it would be difficult under present conditions to handle the business otherwise. Formerly there were firms in Germany who imported on their own account, and while there are still a few firms that receive small shipments in this way, the bulk of the business is done on the basis outlined above.

MARKET FOR CANNED SALMON IN MEXICO

Trade Commissioner C. Noel Wilde

Mexico City, January 29, 1923.—Although Mexico may not be a large consumer of imported fish products as compared with many other Latin American countries, there is a considerable demand for certain classes of fresh, dried, smoked, salted and canned fish among all sections of the population, and among these various classes of goods canned salmon holds a high place. In the remotest portions of the Republic, frequently far removed from rail transportation, a few cans of salmon may be seen in every native general store, and the Indian peon looks upon this product as a luxury which he is able to afford only on rare occasions, but is always willing to purchase when in a position to do so. Among the more educated and wealthy portion of the population, canned salmon is well known and forms a normal article of diet at frequent intervals. The principal demand comes from the towns of the interior, as the coastal regions are plentifully supplied with fresh fish from the ocean, which is usually preferred on account of its cheapness as compared with the imported article. There is also a fair consumption among the mining and oil camps scattered throughout the country, and in addition, the observance of religious fast days increases the demand to a certain extent.

IMPORT STATISTICS

No statistics are available from Mexican sources as to the actual imports of canned salmon into the country, as the official classification includes in one item a large variety of canned products. Information obtained from other sources, however, indicates that the demand in the past has been on an increasing scale, and will continue to increase as soon as the present business depression has passed; it would appear therefore that the market offers a favourable opportunity for Canadian canners to make plans for the introduction of their goods on an extensive scale. According to figures obtained from Canadian and United States sources, the following represents the imports into Mexico from these two countries during the years 1920 and 1921 respectively:—

	1920 Lbs.	1921 Lbs.	Average Lbs.
United States	4,950,099	2,286,759	3,618,429
Canada	589,000	125,500	357,250
Total, lbs	5,539,099	2,412,259	3,975,679

Thus Canada, so far as the statistics show, secured about 9 per cent of the Mexican market in this particular product. Efforts have been made recently to increase this proportion, but these have not met with the success they deserved,

largely on account of the higher price of British Columbia salmon as compared with that from Puget Sound and Californian points. Now that this situation is reversed, the time appears to be ripe for the matter to be considered more in detail, and it is hoped that the information provided in this report may be of assistance to canners who wish to enter the Mexican market, as they may now do with every prospect of success.

ORIGIN AND DESTINATION OF IMPORTS

The majority of canned salmon consumed in Mexico appears to come from ports on the Pacific coast of the United States; a certain quantity bears New York labels, some comes from England and Japan, and some other countries supply a small amount; in general, however, it may be taken that Puget Sound and California control the market, very little being seen which bears a Canadian mark of origin.

From the Pacific coast, shipments arrive principally via El Paso or Manzanillo, whence they are distributed throughout the country. In addition, about 18,000 cases arrive annually at Laredo, a considerable quantity reaches the country via Vera Cruz, and about 500 cases monthly are reported to come to Salina Cruz; a quantity also arrives at Progreso, destined for the Yucatan market, and other ports take shipments of minor importance.

NATURE OF THE DEMAND

The demand in Mexico is almost exclusively for pinks, and this applies more especially to the native Indian population. Reds are too expensive, and there is a prejudice against Chums which has been developed in the course of time, originally on account of their light colour, which afterwards extended to the name itself; curiously enough, this prejudice is now more against the name than the article, for Chums command a ready sale when labelled as Pinks—a practice which is unfortunately becoming too common, the cans being sent to Mexico in blank, and labelled on arrival. The 1-pound tall is the most popular size, there being only a small demand for the 1-pound and ½-pound flats. Canadian canners are therefore recommended to devote their efforts to introducing the Pink variety, packed in 1-pound tall cans, as a preliminary measure, leaving the Reds until a later date, and in particular making no attempt to sell Chums at present.

LABELLING

The labels on the cans should be a brilliant red in colour; the lettering should be clear and conspicuous, and printed in English. There is no demand whatever for salmon in cans with labels of colours other than red, as the public have been educated to expect good salmon in red tins; neither will they purchase cans the labels of which are printed in Spanish, as they imagine that these are a local product, and therefore inferior in quality. There would be no objection, however, to pasting an additional label across the top of the tin, printed in Spanish, bearing a notification to the effect that the goods themselves are of Canadian origin, and packed under the supervision of the Canadian Government, thus guaranteeing the quality; this label could be white, or some other colour contrasting with red.

Labels should bear a picture of the fish in a conspicuous position (in accordance with Canadian practice), as this indicates the nature of the contents to that portion of the population which is unable to read; the tail of the fish should be raised; and the word " Pink " should also appear in a prominent position.

Before making the first shipment, canners should register the label which they propose to use, as ownership of trade marks, labels, etc., in Mexico depends

upon registration, and not upon prior use. The small cost involved in taking this precaution amply repays itself in the prevention of piracy of trade marks, and the consequent difficulties and loss involved in contesting ownership in the courts. (A further report on this subject, giving details of the manner in which registration may be made, will appear in the *Commercial Intelligence Journal* at an early date).

ROUTING OF SHIPMENTS

It would be desirable for Canadian canners to investigate carefully the best routes for shipment of their goods, both by rail and by water. As already mentioned, canners on the Pacific coast ship either by El Paso (by rail) or by Manzanillo (by water), whence consignments are delivered to Mexico City (the principal consuming centre) over the lines of the Mexican National Railways. For the Tehuantepec district, Salina Cruz is the most suitable port of entry, and for Yucatan, shipments should be made to Progreso. Importers themselves express no preference for any particular route, though it must be borne in mind that there are no dockage facilities at Manzanillo at present, all freight being transferred by means of lighters, and unloaded by hand. At El Paso there are suitable handling facilities, but the delay in crossing the United States frequently counterbalances this advantage. At Salina Cruz there are ample modern unloading facilities and good dockage and warehouse accommodation, but Progreso depends upon lighterage and hand labour.

There should be no handicap for Canadian canners in the matter of freight rates, as salmon is sold in Mexico which originates at points far north of Vancouver, and therefore has to bear the expense of a longer haul.

PRICES AND QUOTATIONS

With regard to prices, it would be necessary, in making a serious effort to secure a footing in Mexico, for canners so to adjust quotations that the article could be sold retail at a slightly lower figure than the brands which are at present on the market. The quality of most of these brands is reported to be entirely satisfactory to the consumer, and being well known, no new product is likely to be accepted unless some inducement can be offered in the way of cheapness; this inducement need only be offered at first, for once a brand becomes established, it can compete in the open market at equal prices, or even higher if it meets with popular favour.

Quotations should invariably be made c.i.f. Mexican port, as it is quite impossible for importers to calculate delivered costs on the basis of prices f.o.b. Canadian points; in this connection it should be borne in mind that Mexican consular fees amount to 5 per cent of the invoice value of the goods, this 5 per cent being payable by the exporter; the amount should therefore be included in the quoted price.

At present, retail prices of canned salmon are from 45 cents to 55 cents Mex. per 1-pound can, equal to 22½ cents to 27½ cents Canadian currency.

TERMS

The question of price also involves the question of terms. An importer, having a satisfactory connection and large sales, is as a rule unwilling to do business with an unknown firm, and he therefore requires some special inducement in order to introduce a new article. This applies with particular force to all classes of foodstuffs, and the Canadian canner must therefore be prepared to grant extended terms for the first order, or even to ship on consignment. No real hesitation need be felt on this score if suitable precautions be taken, a report being secured as to the financial responsibility of the proposed customer from one of the two Canadian banks having branches in Mexico, and action being taken in accordance with the opinion expressed in such report.

If the first shipment were found to be satisfactory, and a suitable connection were made, further orders could be based upon terms which are customary in the country, i.e. thirty days' sight or cash against documents, longer credit being unusual except in special cases.

ADVERTISING

It would be desirable for an exporter to make a certain appropriation for advertising expenses in Mexico, although this is not absolutely essential in all cases; at the same time, a well-chosen, well-designed advertisement or poster always attracts attention, and is of very great assistance in stimulating sales. Showcards for exhibition in the window or on the counter of the retailer also assist in the disposal of goods, but it would probably be better to have these printed in Mexico, as good, artistic designs, suited to the taste of the local population, are always preferable to those designed without knowledge of what appeals to the people. Moreover, the duty of $2.50 Mexican per kilo, plus 12 per cent (equal to 63·7 cents Canadian currency per pound), on advertising matter, which has recently been imposed, makes the cost of importing showcards almost prohibitive.

In any case, canners would find it necessary to supply a few samples of their product free of charge, so that importers could test the quality, and make a comparison with the brands at present on the market.

In connection with advertising, it is well to mention that the native has been educated to ask for "Alaska Pinks" when buying canned salmon, and it would be desirable, when undertaking propaganda with the object of introducing the Canadian article, to adopt some concise, easily pronounceable name, such as "Canada Pinks."

QUALITY

As regards quality, the ordinary product as consumed in Canada is quite satisfactory for the Mexican market. It is true that certain criticisms have been levelled against consignments of Canadian salmon which have been shipped to Mexico in recent years, the chief complaint being that the meat was broken, and not of the firm, solid consistency which is so acceptable to the consumer; this criticism has, however, been levelled against competing products, and if it is borne in mind that only the best quality consistent with price is required, no difficulty need be anticipated on this score. A shipment of inferior quality, which would not be accepted in Canada, has an equally small chance of acceptance in Mexico, and should therefore be avoided at all costs.

With regard to packing, no special precautions need be taken, the methods adopted for general foreign trade being quite suitable for this market. Cases for water shipment should be well strapped, but unstrapped cases are quite strong enough for the all-rail route.

DUTIES

The duty on canned salmon in Mexico is 20 cents per kilo, equal to 4·6 cents per pound Canadian currency, this duty being based upon the weight of the salmon itself plus the weight of the immediate containers, but not including the weight of the packing cases; in addition to this duty, there are certain surcharges on account of municipal and federal taxes, which would increase the total duty to the equivalent of about 5·2 cents Canadian currency per pound. This, however, is unimportant from the exporter's point of view, as no preference is given by the Mexican Government, and competition in this respect is equal in all countries.

CONCLUSION

It has been suggested that a number of Canadian canners associate themselves together for the purpose of making effective propaganda in Mexico, adopting one label specially designed for the purpose, and sharing the expense

and responsibility until such time as a steady demand for the article has been created. This proposal deserves favourable consideration, and, on the whole, appears to offer the best chances of success.

If energetic and prompt action is taken in accordance with the suggestions outlined above, and careful attention given to all details of shipping, packing and documentation, there is no reason why Canadian exporters should not secure an increasing proportion of the market and establish themselves on a sound basis in a country which offers every prospect of a steady demand and increasing sales in the future.

RUBBER GOODS IMPORTS INTO THE WEST INDIES

Trade Commissioner E. H. S. Flood

Barbados, January 27, 1923.—Trinidad is the only colony in the West Indies that gives a separate classification in the customs returns for the import of rubber tires. In the other colonies the rubber tire is included with the parts of motor cars, cycles, trucks and vans imported, and in estimating the value of the tires it would be conservative to place it at one-half the total import of "parts." In British Guiana the value of parts of motor cars in 1921 was £14,025, one-half of which we assume as being the value of tires. Taking in the same way the statistics of Barbados, one-half the import would be £15,049, and of the Leeward and Windward Islands £6,140.

Tabulating these it will be seen that the value of the tires imported into Trinidad, and the estimate from the other colonies, from last available statistics, total approximately £66,000, was: Trinidad, £38,398; British Guiana, £7,012; Barbados, £15,049; Leeward and Windward Islands, £6,140.

DIFFERENT MAKES OF MOTOR CAR TIRES AND TUBES IMPORTED

The principal makes of tires stocked in Barbados are the Goodyear, Goodrich, Firestone, Canadian Dunlop and Fisk. Several other makes less in demand on the market are the Avon, Van der Linde (Canadian), Vacuum Cup, Gutta Percha & Rubber Ltd., Acme and Racine. The best sellers, however, are the Goodyear and Goodrich tires, with keen competitors in the Firestone and Canadian Dunlop.

The size mostly in demand is 30 by 3½, as this is used on the Ford cars, of which there are more in the island than of any other make. Next in demand are sizes 28 by 3, 30 by 3 and 31 by 4, which are used on the Maxwell, Saxon and Overland four-seaters. The larger sizes, such as 32 by 4, 33 by 4 and 34 by 4½ are for the Overland seven-seater, Willys-Knight, Studebaker and other seven-seater cars.

In the majority of cases English measurements are used, but millimetre sizes are used also, supplied through United Kingdom firms, though some American and Canadian firms manufacture these sizes when specially ordered. Both clincher and straight side types are imported.

From the selling price of tires in Barbados, which ranges from $11 to $45, some idea will be formed of the quality, size, and general type of tire required. Prices of tubes vary from $2.75 to $8. The cost of importing English and Canadian tires is between 25 per cent to 30 per cent duty paid, and United States from 40 per cent to 45 per cent duty paid. It may be mentioned in regard to prices at which tires are sold in Barbados that the Goodyear and Goodrich makes are now quoted so low that it is difficult for other tires to find sale at a margin.

As shown in the table, the import of tires into Barbados is valued at £15,049. The requirements of this island for the various makes and sizes of tires as outlined above would equally apply to Trinidad and Demerara. The roads, however, in Barbados being laid in hard coral stone, and not being

particularly smooth, require a stronger outside tire than is required in the other two colonies.

The bulk of the trade is with the United States. Of the total import in 1921 into these colonies of approximately £66,000, the import from the United States was £47,000, Canada coming second with about £9,449, and the United Kingdom with £7,986.

RUBBER BELTING AND HOSE

In addition to leather belting, which is mostly used, there is a certain demand here for rubber and canvas mixed belting. The sizes required vary in width from a very narrow rubber belt to one 8 inches wide. Prices vary from 4 cents per foot to 48 cents f.o.b. point of shipment, while the leather belting imported costs much more. It would appear from inquiries that more mixed canvas and rubber belting is used in the engineering works than of any other kind. The supply comes about equally from the United Kingdom, the United States, and Canada.

Four varieties of rubber hose are used here: the garden hose, hose for watering the streets, a large hose used in the water boats for supplying water to ships, and the steam hose. The garden hose ranges from half an inch to one inch, and the price varies from 14 cents to 24 cents, first cost. Steam hose is generally about one inch, and the cost about 48 cents per foot. The heavier kinds of hose used for the fire brigade and water boats are imported by the Government through the Crown Agents in London, and are of English manufacture. The size imported for both purposes is 2½ inches wide. Street hose, also 2½ inches wide, of mixed canvas and rubber, is imported by the sanitary authorities, usually from some English firm. The last importation, it is interesting to note, was from a Canadian firm having an agent here.

RUBBER GOODS IMPORTED BY THE HOSPITALS AND DRUG FIRMS

The Barbados General Hospital purchases its rubber supplies from a firm in London. The secretary of the hospital states that the import of these goods for his hospital is considerable, as it is necessary to keep in stock a great variety of rubber goods required by the surgeons of that institution. He mentioned, as showing his requirements, that his last order for rubber gloves amounted to twenty dozen pairs, sizes 7 and 7½, and that it is necessary to keep constantly in stock a supply of air pillows, hot water bags, ice caps, rubber sheeting, and other small items.

The druggists in the island also carry in stock a supply of rubber sundries of this class, but they import chiefly from the United States and Canada.

The import of india-rubber manufactured goods, principally rubber belting and hospital supplies, from last returns shows a value of £41,446. The import is chiefly from the United States for all the colonies, except British Guiana and Barbados, where a considerable quantity of the goods comes from the United Kingdom. Canada supplied in 1921 to the value of £9,007.

BUSINESS METHODS IN THE TIRE AND HOSPITAL SUPPLIES TRADE

Most of the garages here act as agents for some particular make of motor car tire, which they endeavour to supply to the customers to whom they formerly sold motor cars. A number of manufacturers' agents also sell tires which in some cases they stock and act both as jobbers and sellers direct to the owners of motor cars.

Hospital and druggists' rubber sundries are generally sold by means of illustrated catalogues, although occasionally a traveller representing a firm in other lines carries as a side line samples of such rubber goods. Catalogues are regularly supplied by English and American supplying houses in these lines.

The writer is informed that at present a traveller representing a Canadian house, with samples of hospital supplies, is interviewing the trade.

FICTITIOUS OR BOGUS "FIRMS" IN TRINIDAD

Mr. T. Geddes Grant, Canadian Commercial Agent, Trinidad, writes under date January 17 that the Trinidad Chamber of Commerce, Inc., directs attention to the fact that there are certain fictitious or bogus " firms " operating in the colony endeavouring to do business with overseas suppliers. Such " firms " are causing considerable trouble and annoyance to overseas suppliers, as it frequently happens that goods consigned to them have ultimately to be returned to the shipper or otherwise disposed of, or if received on open account, considerable difficulty is experienced in obtaining payment for same, if at all. Overseas suppliers should direct their inquiries either to their consul or through the London, New York, or Canadian offices of the banking institutions which operate branches in the colony.

ECONOMIC CONDITIONS IN CHILE

Trade Commissioner B. S. Webb

THE NITRATE INDUSTRY

Present economic conditions in Chile cannot be considered without a description in some detail of the vicissitudes of the nitrate industry during recent years, and of the variations in the exchange value of the currency resulting from this and other factors. During pre-war years, nitrate of soda was sold and exported in fairly regular quantities, averaging 2,400,000 tons per annum, and at prices ranging from 6s. to 8s. per Spanish quintal of 46 kilos. During the war period a particularly strong demand set in from the Allied countries where nitrate was required both for the making of explosives and for use as fertilizer at a time when the maintenance of food supplies was a matter of great importance to the countries concerned; needless to say plenty of tonnage was available for its transportation at all times. When hostilities ceased in 1918 the very large stocks on hand in Europe and America, no longer required for war-time purposes, came on the open market with the result that during the following year exportations were reduced to almost nominal proportions, the tonnage exported being less than one-third of an average year's exportation. War-time stocks having been partially absorbed, the year 1920 saw a revival of optimism amongst European distributors who anticipated that large quantities would be required by agriculturists for the restoration of exhausted lands; in June, 1920, confidence in the future of the nitrate industry was such that a group of European distributors made arrangements for the purchase of 900,000 tons at unprecedently high prices on the strength of the assumption that a strong demand would set in from European agriculturists. The realization of the facts of the case came towards the end of the year when it was discovered that, while the need for the fertilizer undoubtedly existed, the European agriculturist could not afford to pay its price, with the result that unsold stocks again began to accumulate in Europe. During the year 1921, the Chilian nitrate producers shipped certain quantities of the nitrate contracted for under the 900,000-ton contracts referred to, but did not receive a dollar's worth of new business. The seriousness of the situation, with which the European distributors were faced, brought about their federation into an entity known as the Nitrate Pool, the representatives of which succeeded in obtaining an arrangement from the Chilian Nitrate Producers' Association, under which the association undertook to keep its prices at a level which would allow the pool to dispose of their stocks without the staggering losses which would have been incurred had the members of the

association sold at current prices to outside distributors. Under this arrangement, the term of which expired on June 30, 1922, the association paid the pool a certain amount for each quintal of nitrate sold or exported by the association. One million five hundred thousand pounds have already been paid as indemnity under the arrangement, but this sum, large as it is, represents but a small portion of the losses incurred by the pool, currently supposed to amount to approximately $35,000,000 Canadian. A large part of the 1921 production of nitrate is still lying ready for shipment at the seaports, stocks on hand in Chile to-day being estimated at over a million tons; and since June last, most of the plants have either been closed down entirely or are working on a minimum production basis. It may be mentioned that the Chilian Nitrate Producers' Association, whilst protecting their interests of the pool by the maintenance of high prices, has undoubtedly encouraged the making of synthetic nitrate, sulphate of ammonia and other artificial fertilizers.

THE EXCHANGE POSITION

A continually varying exchange is a most serious handicap to trade, and in Chile to-day the exchange overshadows everything. The violent fluctuations of Chilian exchange, in a large measure due to speculation, make c.i.f. business exceedingly difficult, a condition which is likely to remain until it assumes a steady level of from 9d. to 10d. per paper peso. The annual averages, in pence, from 1910 to 1922 were as follows:—

1910	10.8	1917	12.7
1911	10.6	1918	15.0
1912	10.1	1919	10.6
1913	9.7	1920	12.0
1914	8.9	1921	8.0
1915	8.2	1922	6.5
1916	7.4		

While 6·5d. is given as the 1922 average, the variations from week to week and even day to day, have been very marked, the primary reason being the extensive and pernicious gambling with which the country is obsessed.

In an attempt to check the speculative mania, the Stock Exchange (Bolsa) authorities are now demanding a much wider margin than heretofore. Furthermore, they carry a current account for all buyers of exchange, so that they can determine whether or not their operations are in proportion to their legitimate business requirements. For all other purchases of exchange, the guarantee of a bank, a nitrate exporter, or a large importer is required, before the transaction can be made. But in spite of these and other restrictive measures, speculation is still present to a deplorable degree; and presumably always will be so until Chile secures for herself the blessings of a stable convertible currency.

It should be mentioned that the method of quoting exchange has been changed from pence in relation to paper pesos, to the cost of the pound sterling in paper pesos. During the second half of 1920 exchange has fluctuated between 35 (paper pesos to the £) and 40. Sterling exchange is also quoted in Chilian gold for the convenience of nitrate exporters who have bills on London to sell, and who require Chilian gold currency for the payment of export duties.

PRESENT PROSPECTS

The year 1920 was a record one for the Republic. The nitrate industry was booming, imports and exports reached unprecedented figures and Chilian exchange went up to 17d. By December, however, the paper peso had dropped to 9¼d. in value and the disastrous period of cancelled orders, rejection and non-payment of goods, and commercial failures commenced. The year 1921

was a period of drastic retrenchment. Many mines were closed down for lack of orders; reduction of wages gave rise to labour troubles, and strikes were in turn succeeded by lock-outs; import duties were raised by 50 per cent, and the nitrate market, the all-important factor to Chilian commercial prosperity, collapsed for the reasons discussed in the previous section. The year 1922 has shown no very great improvement, although nitrates are in rather better demand. The export of this commodity however is so vital to the country that only with the improvement of world conditions and increased buying power in Europe and America will the economic conditions of Chile definitely recuperate. Few countries are so completely dependent for their commercial stability on the condition of others as is Chile, whose prosperity depends almost entirely on one commodity for which the number of markets is limited.

Furthermore, the present low exchange value of the paper peso is a deterrent to the import trade, the more so because of its disturbing fluctuations. But these items of stress have had one good effect; they have taught the Chilian the danger of having all the eggs in one basket, and the agricultural and manufacturing industries are showing a healthy tendency to replace, or at least supplement to a far greater degree than heretofore, the nitrate industry as a source of national wealth.

All factors taken into consideration, it would appear that no very startling improvement in the Chilian nitrate industry and, consequently, in the exchange position can reasonably be expected during the next few years; the purchasing power of the market must necessarily be limited during this period and c.i.f. business, as compared with sales from local stocks, will be comparatively difficult to consummate. Canadian manufacturers are, however, recommended to continue their efforts to establish connections with the English and American merchant houses and with the native Chilian importing houses so that satisfactory arrangements may be available against the time when trade prospects begin to brighten.

GERMANY'S REVIVING TRADE WITH THE STRAITS SETTLEMENTS

Germany comes fairly low down in the list of countries competing for the trade of British Malaya, and the most recent statistics suggest that its share is still declining, says the *British Export Gazette*. Thus the average annual imports into the Straits Settlements from Germany between 1906 and 1910 were valued at £626,000, and from 1911 to 1915 they were £565,000. During the war they were, of course, non-existent. In 1920 they reached nearly £231,000, but in 1921 there was again a drop, though we believe it to be only temporary, to £103,000. German goods entering the market in 1921 included ironware to nearly £15,000; beer to £14,500; apparel to £8,980; hardware to about the same amount, and lamps to £6,650. On the other hand, in 1921 the Straits Settlements exported produce to Germany to no less than £1,238,530, or nearly level with the shipments in the years immediately prior to the war. That implies that before long Germany may again be exporting to the Settlements manufactured goods equivalent in value to the produce—copra, rubber, rattans, tin, etc.—it purchases from this part of the world.

MOTOR VEHICLES IN CHILE

Assistant Trade Commissioner P. W. Cook

Buenos Aires, January 3, 1923.—As in other South American Republics, the civic development of Chile has reached a high level, while that of the country districts has been correspondingly neglected. Thus up to the present the market for motor vehicles has been in a great measure limited to the larger towns and cities. Furthermore, the depressed economic conditions of the last two years, resulting from the comparative stagnation of the nitrate industry and the depreciation of Chilian currency, have held the market in check. Yet, in spite of these difficulties, the prospects for cars and trucks is to-day by no means inconsiderable. The formation of automobile and cycle clubs and the improvement and construction of roads, either in progress or projected, have given impetus to the import of pleasure cars; and the healthy tendency of the country to turn more to agriculture and industry, and to depend less on nitrates, is undoubtedly improving the market for commercial vehicles and tractors.

The following are the statistics of imports for 1920:—

	Pleasure Cars		Commercial Cars	
Country of Origin	Kilos	Value $	Kilos	Value $
Germany	18,680	69,630	5,300	2,500
Belgium	10,165	53,085	7,240	19,690
United States	1,021,167	2,950,938	186,794	471,013
France	16,445	63,550	15,982	94,679
Great Britain	35,035	151,760	62,583	154,586
Holland	1,000	4,000	....	....
Italy	13,994	50,000	....	....
Argentina	....	....	1,093	1,033
Switzerland	....	....	10,600	42,000
	1,116,486	3,342,963	289,592	776,501

Values in Chilian $ of 18d. sterling.
Chilian imports are classified by weights and not by numbers.

From these, it will be seen that United States or Canadian types are in the greatest demand. Some brief description, therefore, of the conditions affecting motor transport and the import of motor vehicles may be of interest to Canadian manufacturers.

ROADS

In the majority of Chilian cities and towns the roads are constructed of stone setts (or " pavé ") and asphalt. Wood-block paving is also occasionally used. Country roads are commonly on a natural base of rock, earth or sand; during the winter rains, they are sometimes so muddy as to present considerable difficulty, but on account of geographical conditions and the generally mountainous character of the country, they dry rapidly and do not usually cause lasting inconvenience. Dust in summer is troublesome. The roads in towns are about 8 to 20 metres wide, but in the country they are generally open tracks of no definite width. Every variety of gradient is encountered as few parts of Chile are level for any distance; in some instances, these gradients are impossible for light-powered cars.

Level crossings are commonly met with, but in the absence of raised rails are easy to negotiate. A more serious condition is the occurrence of " caniveaux," or ridges across the roads, which have been known to twist the chassis to such an extent that the fan has come in contact with the radiator. These, however, are found only in the sub-tropical districts of northern Chile, and rarely, if ever, in the colder regions of the south.

Bridges are as yet comparatively scarce, and the usual method of crossing rivers is to ford them, or to be towed across by an ox-cart or ferried on a barge, attached to a wire cable. Bridges are becoming more common, and it is only a question of time until all the more important roads will be equipped in this respect.

In general, the majority of the natural roads, particularly in the south, are quite suitable for motoring, and in many places it is possible to travel in safety at the maximum speed of the car.

RULES AND REGULATIONS

While the regulations controlling motor traffic in Chile have not yet reached the careful and detailed form of European or North American regulations, they are more or less standard throughout the country. The regulations are not fixed, but change from year to year. There are no English translations yet available.

In some towns, speed is limited to twenty-five and often to ten kilometres per hour; in others, and in the country, there is no speed limit. In many city streets, traffic is permitted in one direction only because of their narrowness. Licenses, issued by the municipalities, are required for the vehicle (with the number plate) and also for the driver. If he is travelling, any municipal license is valid throughout the country, but another is necessary if he changes his place of residence. The cost varies from 80 to 120 Chilian pesos. As licenses are not issued by one central authority, statistics cannot at present be obtained of the number in current use.

The general rule of the road is to keep to the right and overtake to the left, and it is more or less uniform in all parts of the Republic. No lighting regulations exist, but it is desirable for country travelling to have powerful searchlights. Any bell, horn or buzzer is allowed, but the use of sirens is restricted to fire brigades and ambulances.

Toll-gates are few and exist only on private roads. Members of the Automobile Association pay half the usual toll-gate dues, which vary from one to four pesos.

FACILITIES FOR TOURING

The motor tourist in Chile will find all kinds and conditions of hotels, from first class in the cities to very indifferent in the country; but fair accommodation is usually available. In some instances, however, sanitary conditions are not all that might be expected, and it is occasionally desirable to carry one's own soap; particular people have been known to make a practice of travelling with a tin of Keating's. Stations where gasoline, oils, tires and accessories may be purchased, and where minor repairs can be executed, are fairly general and are increasing in number. The distance between such stations is from 3 to 50 miles, depending on the comparative population of the country. Gasoline is sold by the litre and in tins of 15 litres (or five Canadian gallons) at a price of from eight to twelve pesos per ton. The price is not uniform, but varies according to the locality and to the location of the dealer.

DEMAND FOR MOTOR CARS

The largest percentage of cars now in use in Chile is of United States manufacture. Second in point of numbers are British makes, and the remainder is made up of small undetermined percentages of French, Italian, German, and Belgian cars. The majority of trucks are also from the United States. There are no cars made or assembled locally. The reasons for the comparatively small number of European cars in use are, apart from the question of price,

want of power of hill-climbing, cooling systems inadequate for the heavy work demanded by the character of the country, too little ground-clearance, springs insufficiently stiff for the rough roads, and the alleged difficulty in obtaining spare parts for repair purposes. The general character of the cars demanded by local conditions are: heavy touring cars, 40 to 80 B.H.P., 7-seater closed types; moderate-priced cars, 35 to 50 B.H.P., open 5-seaters; light cars, 4-cylinder 25 B.H.P., 2-seater sport bodies. The lightness of the body is an important item, and wire or disc wheels easy to mount and dismount are a great advantage. Clearance should not be less than 10 inches between the ground and the lowest suspended part of the car. Springs should be long, wide and powerful, preferably including a cross spring on the back axle. Upholstering should be particularly well sprung. Other important details are sturdy shock absorbers, front and back, a magneto in addition to battery ignition, a first-class water pump of rather more than normal capacity, a wide brake surface, and, if possible, a dry-plate clutch.

COMMERCIAL VEHICLES

The day of the motor truck and tractor is dawning in Chile. Omnibuses, char-à-bancs and delivery vans are making their appearance and are already finding a market of some importance. Chilian taxis are ordinary light cars without meters. Motor ambulances are common, and fire engines in the larger cities are generally on truck chassis. Municipal and public utilities are increasing the use of motor vehicles for other purposes; the Valparaiso post office uses motor deliveries, and in Antofagasta and Vina del Mar, city scavenging is done by truck. There are no motor road-sweepers. Several firms are pushing the sale of tractors, but horse flesh and oxen are still cheap and there is not yet any very great incentive to undertake specialized or intensive agriculture. However, the present trend of the country towards emancipation from its dependency on the nitrate industry is likely gradually to result in important agricultural development, which will create a fair market for tractors. These, however, will need to be of light and sturdy construction and cheap in price.

At present, all motor trucks are imported complete. Assembling in the country has been tried, but no advantage was found in respect of duties. The sizes most saleable are of 2-, 3- and 5-tons capacity, from 25 to 50 B.H.P., carrying complete sets of accessories with each truck. Some business might advantageously be done in chassis with interchangeable bodies, if the change could be effected easily and rapidly.

MOTOR CYCLES

The use of motor cycles is increasing, particularly for commercial purposes. The machines most commonly in evidence are the Harley-Davidson and Indian, among United States makes, and the Triumph and Douglas, among British makes. Much the same conditions apply to the essentials of motor cycle construction as to those of car construction, namely a high clearance, strong frame and springs, and powerful headlights. Cycles should be accompanied by side-cars and complete accessories. The general opinion of dealers is that there is a very bright future for a powerful and moderate-priced cycle complying with these conditions, as many thousands of miles of Chilian territory are approachable by cycle, which are impossible for heavy cars.

TRADING CONDITIONS, SHIPPING AND DELIVERIES

The import of motor vehicles is conducted through wholesale agents, who are allotted exclusive rights over a certain territory, and who appoint their own sub-agents and retailers. Values are " price maintained " and there is no under-

selling or price-cutting between agents for the same make of vehicle. The trade is not seasonable but remains steady the year round. A list of twenty agents and importers of various types of motor vehicles and accessories is available upon application to the Director, Commercial Intelligence Service, Ottawa.

So far, Chile has not organized any motor shows or exhibitions, nor are there any races, trials or competitions other than those unofficially organized by the importing dealers. There are no societies or associations for the protection of the motor industry. Motorists, however, may join the Automobile Association of Valparaiso or Vina del Mar, the membership of which is between five and six hundred.

The imports of motor vehicles may well be left in the hands of reliable agents in the usual manner adopted by the domestic trade in Canada. If such arrangement, on a commission or a contract basis, could be made with a practical firm of motor-car engineers already established, it would probably prove cheaper and more efficient than any attempt to organize a direct branch of the factory sales office.

Motor vehicles can be imported into Chile during any month of the year *via* either Panama or the Straits of Magellan. Good packing is indispensable, as cases during this long voyage are subjected to much rough handling. Weights should be in kilos and all stencilled instructions in both Spanish and English.

Accessories must never be included with the vehicles, as they are liable to much higher duties and should therefore be entered separately.

In negotiating with agents and discussing terms of contract, only prices c.i.f. Valparaiso or other Chilian port should be considered.

Duties on motor vehicles of all types are 60 cents Chilian gold per gross kilo up to 1,000 kilos; and 40 cents gold per kilo over 1,000 kilos. Accessories are dutiable as high as $6 gold per kilo, according to construction—nickel being a material subject to high rates. All charges are on gross weight including cases. Therefore, without sacrificing strength, cases should be as light as possible.

Tools enter free of duty, if marked clearly as such and packed by themselves. It is of great importance that no spares or accessories be included in a case containing tools, as the entire contents of the case are then chargeable in accordance with the highest category under which any one article is classified. For the same reasons spares should not be packed with accessories.

CONDITIONS IMPROVING IN ALGIERS

Import merchants in Algiers report at last a better outlook, with hopes entertained for a better year to come, although 1922 has certainly not been a bad one, all things taken into consideration, says *Kelly's Monthly Trade Review*. The first three quarters of the year brought a very considerable increase in Algiers' export trade; and as imports decreased in the same period, the trade balance was certainly then in favour of the country. Who would have thought before the war that Algiers in the short space of nine months, as is the case this year, could effect exports of products in value of 1,065,247,000 francs? This is an increase of 160,000,000 francs on last year's corresponding nine months' period; and as the imports declined by 58.5 million francs in value, it is obvious that import merchants have been holding back their orders for some considerable time owing to rate of exchange difficulties, general stagnation and lack of confidence; and therefore there should soon again be some substantial orders placed in Europe.

COMMERCIAL CONDITIONS IN ARGENTINA

ASSISTANT TRADE COMMISSIONER P. W. COOK

Buenos Aires, January 18, 1923.—There is little to report on crop prospects. Total yields should be exceptionally good, but some local papers forecast disappointment, as in certain districts the grain has not filled as well as was expected. Pasture is poor, resulting from the drought, and for the same reason the maize crop is likely to suffer to a certain extent.

Cereal exports are well maintained. Up till January 12, 1923, exports of wheat were 59,603 tons as against 34,421 in the same period of 1922; maize, 132,184 tons as against 68,345; linseed, 47,182 as against 24,146; oats, 9,637 as against 6,246. The estimate of the exportable surplus is: wheat, 2,880,896 tons; linseed, 1,248,412 tons; oats, 500,000 tons; maize, 3,878,000 tons.

Cereal prices are practically steady; February futures were quoted on the Bolsa (January 11) as follows: wheat, 11.65 pesos m/n; linseed, 17.20 pesos m/n; oats, 7.70 pesos m/n; maize, 8.45 pesos m/n.

Wool demand remains firm and prices are hardening, but exports to date this year are 60 per cent less than in the same period of 1922. Present stocks amount to 8,758,471 kilos, as compared with 16,941,431 kilos at the same date last year. Chilled beef steers show little variation, but the cow market is weak. The maximum price for special bullocks appears to be about 80 pesos m/n. The sheepskin market is active, and tallow, birdseed, hair, skins and bones remain firm.

Exchange is steady with the exception of the marked depreciation of French and Belgian francs. Sterling and the dollar show a slight weakening tendency. In the security market, Government bonds are decidedly weaker, indicating a demand for industrial or commercial capital. Other securities remain firm, with petroleum shares stronger. The figures on financial failures during 1922 may be summarized as follows: meeting of creditors, $91,546,010 m/n; bankruptcies, $12,598,363 m/n; non-commercial failures, $22,330,156 m/n; compositions, $1,600,654.

Local stocks, chiefly German, are still in some measure filling the market requirements. Demand in general is not up to expectation; but the optimism in commercial circles still remains.

A trade development of some importance is the establishment, under the control of the United States Shipping Board, of the International Freighting Corporation's new direct service from Boston and New York to the Plate. Much interest also attaches to the inauguration on January 25 of the service from United States Pacific ports to Rio and Buenos Aires via the Canal Zone. The vessels of this line, known as the Pacific Argentine-Brazil Line, are fitted for tropical travel and include refrigerating space. British Columbia shippers have now at their disposal greatly improved facilities for export to South America.

The proposed tariff amendment (dealt with in *Commercial Intelligence Journal* No. 992) is the only Government activity of interest to Canadian manufacturers. There is in Buenos Aires much discussion and speculation on the effect in Argentina of the French occupation of the Rhur. Large quantities of structural steel, tubing, wire, and machinery have of recent months been imported from this district; for example, Thyssen shapes are to be seen in many of the Buenos Aires buildings under construction, and it is understood this firm is under contract to supply large quantities of steel for the new housing scheme (see *Commercial Intelligence Journal* No. 990) of the municipality of Buenos Aires. The very possible cancellation or delay of these and other Ruhr contracts, resulting from French control, may cause Argentine interests to deal more freely with North American and British markets. Canadian steel and tube interests may possibly benefit materially, as low German quotations have heretofore been the chief factor against their greater success in Argentina.

CUBAN MARKET FOR CERTAIN CANADIAN PRODUCTS

J. L. Gonzalez-Hoyuela, Office of the Canadian Trade Commissioner

Havana, January 31, 1923.—Owing to a consignment of potatoes from Norway which was thrown on this market at $1 per 100 pounds c.i.f., the price slumped considerably, and sales were made as low as $3.25 per sack of 180 pounds, duty paid. Lately, the price has improved to $3.50 and $4 per bag of 180 pounds, duty paid and delivered. The market is quiet and keeps low, owing to the existing differences among the local importers, who worked in harmony up to several weeks ago.

The Cuban potato crop of the Guines district, which seems to be abundant this year, is already in the market and it is estimated that the total production will be about 60,000 barrels. Although this will be a depressing factor on the market, some improvement in prices is expected shortly.

There is a weak market in codfish. Sales are being made to-day of Canadian codfish at from $10 to $10.50 per case, duty paid and delivered. There is no prospect of improvement, for the near future at least, as the market continues to be affected by consignments of Norwegian codfish. On the steamer *Louisiana* there arrived lately 5,000 cases from Norway. The local stock is rather large. However, prices may improve a little on account of the grinding season of the Cuban sugar cane being in full swing at the present time.

Some complaints have lately being heard about the quality of Canadian wheat flours. Local importers state that flours received from Canada this year are not up to the standard of former years. Canadian millers might do well to look into this complaint and try to investigate—if substantiated, the reasons and causes therefor. Canadian wheat flour, first patent spring wheat, is now quoted at from $6.90 to $7, and the same grade of American flour, of very good quality, at $7.40. This makes about the same landed cost for both flours, due to the preferential duties accorded to United States products. It is understood that quite a few orders were placed some time ago for Canadian wheat flours.

INVOICING OF CANADIAN SHIPMENTS ABROAD: A SUGGESTION TO EXPORTERS

It is in the interests of Canadian exporters that the official trade reports of other countries should credit to Canada all imports originating in this country. Where Canadian exports are consigned to their final destination through agents in the United States or other countries they are sometimes invoiced as from the latter rather than from Canada. As a result the entry in the importing country contains no reference to the Canadian origin of the goods.

It is considered desirable therefore that Canadian exporters should instruct their agents in such cases to invoice their goods specifically as made in Canada.

AD VALOREM DUTIES IN BRITISH GUIANA

The Department of Trade and Commerce has received a copy of the British Guiana Customs Duties Ordinance No. 31 of 1922, which was assented to on December 23. Among other things, this Ordinance changes the duty on unenumerated goods to $16\frac{2}{3}$ per cent ad valorem, preferential tariff, and $33\frac{1}{3}$ per cent ad valorem, general tariff. (See *Commercial Intelligence Journal* No. 992, February 3, 1923, page 189.) It appears from the tariff as published that this item is excepted from the surtax of 50 per cent of the duty applicable to other items in the table of ad valorem duties.

AUSTRALIAN TENDERS

Copies of tender forms and specifications have been received from Mr. D. H. Ross, Canadian Trade Commissioner, Melbourne, for equipment and material required by the Commonwealth Postmaster General's Department, Melbourne, and for material required by the Victorian Government Railway Department, Melbourne.

These tender forms and specifications are open to the inspection of interested Canadian manufacturers at the Department of Trade and Commerce, Ottawa.

Tenders in conformity to the specifications should be addressed respectively (1) to the Deputy Postmaster General, Melbourne, Australia, (2) to the Secretary, Victorian Government Railways, Melbourne, Australia.

Particulars of the requirements are briefly outlined thus:—

(1) POSTMASTER GENERAL'S DEPARTMENT

No.	Date of closing	Particulars
Vic. 113.	Mar. 27, 1923.	Supply and delivery of approximately 622 miles of underground and submarine cables, as specified.
Vic. 114.	Apr. 24, 1923.	Supply and delivery of approximately 403¼ miles of switchboard cables, as specified.
Vic. 117.	Apr. 24, 1923.	Supply and delivery of 37,284 telephones and handsets, as specified.

(2) VICTORIAN GOVERNMENT RAILWAY DEPARTMENT, MELBOURNE

No.	Date of closing	Particulars
35816.	Apr. 18, 1923.	Supply and delivery of one power geared curving rollers, one gang punching machine, and one inclinable geared power press, all three to include tools and accessories, as specified.

NOTE.—A memorandum has been received from Mr. D. H. Ross, Canadian Trade Commissioner, Melbourne, to the effect that the Commonwealth Postmaster General's Department has made an amendment of the quantities of covered wire called for by schedule Vic. 104, formerly published. Notification of the calling of tenders in this connection appeared in the *Commercial Intelligence Journal* No. 992, (February 3, 1923, page 194). Revised specifications are on file in the Department of Trade and Commerce, and may be obtained by interested parties on application.

STEAMSHIP SERVICE BETWEEN RIVER PLATE AND MONTREAL

Messrs. McLean Kennedy Limited, Montreal, advise that the Houston Line ss. *Hesperia* has been berthed to load at the River Plate at end of March for Montreal direct and should arrive at Montreal on the opening of navigation. This will afford a good opportunity for direct importation into Canada from the Argentine of such products as linseed and hides. It is understood that this service will be continued if this the first sailing is well patronized.

RAILWAY CONSTRUCTION IN PERU

The concession granted to Robert Dunsmuir, a Canadian promoter [see *Commercial Intelligence Journal* No. 983, December 2, 1922, page 891], has been definitely approved by both Houses of the Peruvian Congress, says the United States *Commerce Reports*. The terms finally allowed, however, are less liberal to the concessionnaire than those in the executive grant, which will render more difficult the financing of this great undertaking. The law, as finally approved, authorizes the executive to offer the same terms to other interests should Dunsmuir withdraw, which is reported as probable. In this event it is probable that the concession would be open to the highest bidder. Certain British interests are said to be following the matter closely.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING FEBRUARY 13, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement on the nominal closing quotations for all the principal exchanges for the week ending February 13, 1923. Those for the week ending February 6 are also given for the sake of comparison.

		Parity	Week ending Feb. 6, 1923.	Week ending Feb. 13, 1923.
Britain .. .. £	1.00	$4.86	$4.7355	$4.7337
France .. .. Fr.	1.	.193	.0648	.0619
Italy .. .. Lire	1.	.193	.0493	.0486
Holland .. .. Florin	1.	.402	.3997	.3998
Belgium .. .. Fr.	1.	.193	.0573	.0548
Spain.. .. .. Pes.	1.	.193	.1591	.1586
Portugal .. .. Esc.	1.	1.08	.0455	.0455
Switzerland.. .. .. Fr.	1.	.193	.1907	.1900
Germany .. .. Mk.	1.	.238	.000027	.000038
Greece .. .. Dr.	1.	.193	.0126	.0126
Norway .. .. Kr.	1.	.268	.1865	.1895
Sweden .. .. Kr.	1.	.268	.2665	.2687
Denmark .. .. Kr.	1.	.268	.1900	.1915
Japan .. .. Yen	1.	.498	.4907	.4903
India .. .. R.	1.	2s.	.3301	.3298
United States .. .. $	1.	$1.00	1.0118	1.0109
Mexico .. .. $	1.	.498	.4978	.4978
Argentina .. .. Pes.	1.	.424	.3756	.3753
Brazil .. .. Mil.	1.	.324	.1176	.1162
Roumania .. .. Lei	1.	.198	....	....
Jamaica .. .. £	1.	4.86	4.7456	4.7501
British Guiana .. .. $	1.	1.		
Barbados .. .. $	1.	1.		
Trinidad .. .. $	1.	1.		
Dominica.. .. .. $	1.	1.		
Grenada .. .. $	1.	1.	.9808-.9834	.9812-.9837
St. Kitts .. .. $	1.	1.		
St. Lucia.. .. .. $	1.	1.		
St. Vincent .. .. $	1.	1.		
Tobago .. .. $	1.	1.		
Shanghai, China .. .. Tael	1.	.708	.7323	.7392
Batavia, Java .. .. Guilder	1.	.402	.3933	.3879
Singapore, Straits Settlements .. $	1.	.567	.5565	.5585

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1260. Wheat Flour.—An importer in Havana, Cuba, desires to represent a Canadian flour mill on a brokerage or commission basis. He is interested in both soft and hard wheat flour, but especially the latter.

Miscellaneous

1261. Linseed Oil, Varnishes, Colours, Steel Ropes, Manila and Hemp Ropes.—A firm in Palermo wish to import from Canada.

1262. Linseed Oil, Gums, Resins and Common Turpentine Oil.—The foregoing are requested by a firm in Leghorn.

1263. Linseed Oil and Turpentine.—A Palermo firm would be glad to consider offers from Canadian shippers.

1264. Paints, Varnishes and Raw Materials for the Manufacture of Varnishes.—An important firm in Milan would be glad to consider offers from Canadian firms doing business in paints, varnishes and raw materials for the manufacture of same.

1265. Paints, Varnishes, Resin, Mica, and Linoleum.—A Turin firm wish to import from Canada.

1266. Raw Materials for Varnishes.—The names of manufacturers of raw materials for varnishes are requested by a firm in Naples.

1267. Varnishes, Colours, Linseed Oil and Common Turpentine Oil.—An Italian firm wish to be put in touch with Canadian exporters.

1268. Varnishes, Ochre, Enamel and Paint Brushes.—A firm in Palermo (Sicily) desire to import the foregoing from Canada.

1269. Colours, Compasses and Metrical Measures.—A Milan firm would like to establish business connections with Canadian exporters of colours, compasses and metrical measures.

1270. Colours, Varnishes, Lumber (including Pitch-pine and Spruce).—These are requested by an Italian firm wishing to open up business relations with Canada.

1271. Colours in Powder, Ferric Oxide, Resin, Linseed Oil and Turpentine Oil.—A firm in Genoa are anxious to get in touch with Canadian firms dealing in the foregoing.

1272. Resin.—A firm in Milan desire to import resin and similar products from Canada.

1273. Hardware, Brass Fittings, Lumber, Hides and Skins, Furniture.—A concern in Genoa desire to import from Canada.

1274. Hardware, Hinges and Locks.—A Genoa firm would be glad to purchase hardware, hinges and locks from Canada.

1275. Hardware and Ironmongery.—A Turin firm would like to purchase hardware and ironmongery from Canada.

1276. Hardware, Hinges and Tools.—A firm in Naples are anxious to receive offers from Canadian firms handling hardware, hinges and tools.

1277. Hardware; Sugar, Food Products; Textiles.—A Neapolitan firm inquire for the foregoing articles from Canada.

1278. Hardware, Tools and Ironmongery.—An important firm in Milan desire to import from Canada.

1279. Hardware.—A firm in Milan would like to establish business connections with Canadian exporters of hardware.

1280. Hardware, Metals and Kitchen Utensils.—A firm in Genoa desire communications from Canadian shippers.

1281. Machinery and Hardware.—A firm of South African importers wish to receive catalogues from Canadian manufacturers of machinery and hardware.

1282. Builders' Material and General Hardware.—A well-established South African manufacturers' agent desires to represent, on a commission basis, Canadian exporters of builders' material and general hardware.

1283. Tools.—An important firm in Milan are willing to hear from Canadian exporters of tools.

1284. Files, Locks and Tools.—A firm in Italy are most anxious to hear from Canadian exporters of files, locks and tools.

1285. Furniture Varnishes, Lumber for Cabinet-work, Hardwoods and Spruce.—A firm in Milan dealing in the above are anxious to get in touch with Canadian firms willing to open up business connections with Italy.

1286. Coal Shovels, Files and Hardware are requested by a firm in Genoa.

1287. Garden Hoes, Rakes and Forks.—A Belgian importer of American machine tools wishes to get into touch with Canadian firms manufacturing garden hoes, rakes and forks with a view to important purchases.

1288. Iron and Brass Screws, Iron Sheets, Iron Wire and Hinges are requested by a Turin firm.

1289. Iron and Brass Screws, Bolts and Metallic Fittings.—A firm in Milan is prepared to consider offers from Canadin firms wishing to do business in iron and brass screws, bolts and metallic fittings.

1290. Electrical Supplies and Industrial Products.—A Belgium importing house desires to represent Canadian exporters of electrical supplies and general industrial products.

1291. Agricultural Machinery and Implements.—A firm in Italy desire to import the foregoing from Canada.

1292. Agricultural Machinery.—A firm in Rome are anxious to receive offers from Canadian firms handling agricultural machinery.

1293. Agricultural Machinery, Chemical Manures, and Copper Sulphate are requested by a firm in Naples.

1294. Agricultural Machinery.—A concern in Italy is anxious to receive offers from Canadian exporters of agricultural machinery.

1295. Cotton Piece Goods, Silks, Furnishings, Hosiery, Ties and Mercery.—A firm in Sydney, Australia, would like to hear from Canadian manufacturers.

1296. General Canadian Agencies.—A manufacturers' agent in Barbados is desirous of obtaining some Canadian agencies. He is more particularly interested in dry goods, including neckwear, underwear, hosiery, boots and shoes; also hardware, wrapping paper, and canned goods.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From St. John

To London.—Batsford, Canadian Pacific Steamships, Ltd., Feb. 20; Ariano, Furness Line, Feb. 23; Rapidan, Furness Line, Feb. 27; Hoerda, I.C. Transports, Ltd., Feb. 28; Sicilian, Canadian Pacific Steamships, Ltd., March 2; Canadian Conqueror, Canadian Government Merchant Marine, Ltd., March 7 (via Halifax); Essex County, I.C. Transports, Ltd., March 11; Bolingbroke, Canadian Pacific Steamships, Ltd., March 12.

To Manchester (via Halifax).—Manchester Regiment, Manchester Line, Feb. 24; Manchester Producer, Manchester Line, March 15.

To Liverpool.—Montclare, Canadian Pacific Steamships, Ltd., Feb. 23; Canadian Miller, Canadian Government Merchant Marine, Ltd., Feb. 28; Marloch, Canadian Pacific Steamships, Ltd., March 2; Montcalm, Canadian Pacific Steamships, Ltd., March 9; Montrose, Canadian Pacific Steamships, Ltd., March 16.

To Glasgow.—Canadian Runner, Canadian Government Merchant Marine, Ltd., Feb. 21; Cabotia, Cunard-Anchor-Donaldson Line, Feb. 28; Metagama, Canadian Pacific Steamships, Ltd., March 1.

To Cardiff and Swansea.—Canadian Squatter, Canadian Government Merchant Marine, Ltd., Feb. 28.

To Hull (via Halifax).—Ariano, Furness Line, Feb. 23; Comino, Furness Line, March 14.

To Southampton.—Minnedosa, Canadian Pacific Steamships, Ltd., March 3; Melita, Canadian Pacific Steamships, Ltd., March 17.

To Belfast.—Melmore Head, Head Line, Feb. 28.

To Dublin, Londonderry and Cork.—Melmore Head, Head Line, Feb. 28.

To Avonmouth.—Cabotia, Cunard-Anchor-Donaldson Line, Feb. 28.

To Antwerp.—Minnedosa, Canadian Pacific Steamships, Ltd., March 3; Melita, Canadian Pacific Steamships, Ltd., March 17.

To Rotterdam.—Hoerda, I.C. Transports, Ltd., Feb. 28; Essex County, I.C. Transports, Ltd., March 11.

To Bermuda, Barbados, Trinidad and Demerara.—Montezuma, Canadian Pacific Steamships, Ltd., Feb. 23.

To Hamburg.—Melita, Canadian Pacific Steamships, Ltd., March 17.

To Havre and Hamburg.—Hastings County, I.C. Transports, Ltd., Feb. 22; Lord Dufferin, I.C. Transports, Ltd., March 18.

To Australia and New Zealand.—Erroll, New Zealand Shipping Co., Ltd., Feb. 21.

To South Africa.—New Mexico, Elder, Dempster & Co., Feb. 25.

To Rio de Janeiro, Santos, Montevideo and Buenos Aires.—Harmodius, Houston Line, March 10.

From Halifax

To Liverpool and Queenstown.—Ausonia, Cunard-Anchor-Donaldson Line, Feb. 20; Andania, Cunard-Anchor-Donaldson Line, March 19.

To Glasgow and Londonderry.—Saturnia, Cunard-Anchor-Donaldson Line, Feb. 25.

To Plymouth, Cherbourg, and London.—Antonia, Cunard-Anchor-Donaldson Line, March 9.

To Bermuda, British West Indies, and British Guiana.—Royal Mail Steam Packet Co., March 2, and every fortnight thereafter.

To Barbados, Trinidad, and Demerara.—Canadian Coaster, Canadian Government Merchant Marine, Ltd., Feb. 21.

To Santiago (Cuba), Kingston, Montego Bay and St. Ann's Bay (Jamaica).—Andalusia, Pickford & Black, Feb. 28.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—Canadian Fisher, Canadian Government Merchant Marine, Ltd., March 1.

To Australia and New Zealand.—Canadian Explorer, Canadian Government Merchant Marine, Ltd., March 20.

To Newfoundland.—Canadian Sapper, Canadian Government Merchant Marine, Ltd, Feb. 21.

From North Sydney

To St. John's (Nfld.).—Kyle, Reid-Newfoundland Co., Tuesday, Thursday and Saturday every week; Sable I., Farquhar Steamship Co., every Saturday.

From Vancouver

To Honolulu, Suva, Auckland, and Sydney.—Makura, Canadian-Australasian Royal Mail Line, Feb. 23.

To Yokohama, Kobe, Nagasaki, Shanghai, Manila and Hong Kong.—Empress of Asia, Canadian Pacific Steamships, Ltd., Feb. 22; Manila Maru, Osaka Shosen Kaisha, Feb. 29.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Canada, Canadian Pacific Steamships, Ltd., March 8.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Yokohama Maru, Nippon Yusen Kaisha, Feb. 28.

To Yokohama and Kobe.—Tokiwa Maru, Nippon Yusen Kaisha, Feb. 20; Toyooka Maru, Nippon Yusen Kaisha, March 18.

To Yokohama, Kobe, Hong Kong and Manila.—Protesilaus, Blue Funnel Line, March 12.

To Yokohama, Shanghai, Singapore.—Grace Dollar, Dollar Line, Feb. 25.

To Yokohama, Kobe, Shanghai, Manila, Hong Kong.—President McKinley, Admiral Oriental Line, March 3; President Jackson, Admiral Oriental Line, March 15.

To Australian Ports.—Canadian Importer, Canadian Government Merchant Marine, Ltd., March 6.

To New Zealand, Australia.—Canadian-Australasian Royal Mail Line, March 15.

To the Orient.—Canadian Winner, Canadian Government Merchant Marine, Ltd., Feb. 28.

To London and Liverpool.—Dramatist, Harrison Direct Line, Feb. 20.

To Yokohama, Kobe, Moji, Darien, Shanghai and Hong Kong.—Arizona Maru, Osaka Shosen Kaisha, Feb. 18.

To Yokohama, Kobe, Moji, Shanghai and Manila.—Manila Maru, Osaka Shosen Kaisha, Feb. 27.

To London, Hull, Hamburg and Copenhagen.—Siam, East Asiatic Co., Inc., late February.

To Manchester.—Craster Hall, Isthmian Line, March 14.

Canadian Manufacturers and Exporters are strongly advised to file all numbers of the "Commercial Intelligence Journal" for future reference, and to bind them with the Index at the end of each half year.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 285 Beaver Hall Hill, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic.

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address, Canadian.*

Australia.

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium.

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil.

Major E. L. McColl. Address for letters—Caixa (P.O. Box) 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies.

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China.

J. W. Ross, Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba.

Address: 400 and 401 Teniente Rey 11, Havana. (Post-office Box 1290.) *Cable Address, Cantracom.*

France.

Lieut-Col. Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany.

L. D. Wilgress, Care British Consulate-General, Hamburg. (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland.

Norman D. Johnston, Zuidblaak 26, Rotterdam. *Cable Address, Watermill.*

India and Ceylon.

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy.

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica.

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan.

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico.

C. Noel Wilde. Address for letters, Apartado Num. 126 bis, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian.*

New Zealand.

W. A. Beddoe, Union Buildings, Customs street Auckland. *Cable Address, Canadian.*

South Africa.

W. J. Egan, Westminster House, Adderly street. Cape Town. *Cable Address, Cantracom.*

Straits Settlements.

P. W. Ward, P.O. Box 121, Singapore. (Territory covers Straits Settlements, British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

A. B. Muddiman, Sun Building, Clare Street, Bristol. *Cable Address, Canadian.*

Major Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States.

Frederic Hudd, 44 Whitehall Street, New York City. *Cable Address, Cantracom.*

CANADIAN COMMERCIAL AGENTS

Australia.

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark.

G. E. Sontum, Grubbegd, No. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies.

R. H. Curry, Nassau, Bahamas.

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

Vol. XXVIII February 24, 1923 No. 995

Trade Commissioner W. J. Egan's Itinerary in Canada
Conditions in Scottish and Irish Industry and Trade
Rubber Commodities Market in the Bristol District
Present Industrial and Trade Situation in Germany
Parlous Condition of the Australian Fruit Industry
Ocean-borne Commerce of the United States in 1922
Trade of Japan in 1922: Canada's Expanding Sales
Trade Inquiries for: Wheat; Grain; Cheese; Maple Syrup; Woodenware; Aluminiumware; Asbestos; Metals; Papers; Woodpulp; Oil Stoves; Lumber

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

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306

TABLE OF CONTENTS

Commercial Intelligence Journal

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Ottawa **Saturday, February 24, 1923** **No. 995**

TRADE COMMISSIONER W. J. EGAN'S ITINERARY IN CANADA

The itinerary arranged for Mr. W. J. Egan, Canadian Trade Commissioner, South Africa, for his business tour throughout the Dominion, as formerly announced in the *Commercial Intelligence Journal,* was interrupted by his participation in the Extension Courses in Export Trade held at the University of Toronto, McGill University, and l'Ecole des Hautes Etudes Commerciales, Montreal. The re-arranged itinerary is as follows:—

Guelph	March 9 and 10
Kitchener and Waterloo	" 12 and 13
Galt	" 14 and 15
Chatham	" 16 and 17
Windsor	" 19, 20 and 21
London	" 22 and 23
Stratford	" 24 and 26
Owen Sound	" 28
Toronto	" 30 to April 4
Winnipeg	April 7, 9 and 10
Brandon	" 11
Vancouver	" 15 to 21
Pembroke	" 25 and 26
Renfrew	" 28
Ottawa	" 30 to May 2
Smith's Falls	May 3
Brockville	" 4 and 5
Montreal	" 6 to 10
Three Rivers	" 11

The dates of his tour in the Maritime Provinces, and his visit to Quebec City will be later announced.

Firms in the cities and towns included in the above table who desire to be brought in touch with Mr. Egan or to interview him should address their communications to the Secretary of the local Chamber of Commerce or Board of Trade.

CANADIAN TRADE COMMISSIONER B. S. WEBB'S FORTHCOMING VISIT TO CANADA

Mr. B. S. Webb, Canadian Trade Commissioner in Buenos Aires, is expected to arrive in Canada in the early part of March, with a view to undertaking a business tour of the Dominion. Mr. Webb is not only familiar with conditions in Argentina, but has recently made personal investigations into conditions in the Republics of Chile and Uruguay. Canadian firms who desire to be brought into touch with Mr. Webb or to interview him are requested to communicate with the Director, Commercial Intelligence Service, Ottawa.

SCOTTISH AND IRISH INDUSTRY AND TRADE

TRADE COMMISSIONER G. B. JOHNSON

Conditions and Prospects for 1923

Glasgow, February 2, 1923.—After four months' absence in Canada, the present writer returned to Glasgow at Christmas. The most striking change noticed was the almost universal but sober and restrained optimism regarding the immediate future of British industry and trade compared with the hesitating and spasmodic hopes prevailing before his departure from Scotland in August. The optimism then in the air has now come down to the earth of solid facts of increasing orders and busier factories.

For British industry as a whole the past year, with the exception of 1921, has been one of depression without parallel in modern times. As a result of over two years' continuous deflation in commodity prices, every one has become completely disillusioned of false ideas about post-war prosperity, and the truth is now permeating the community that the return to individual and national wellbeing can only be attained by hard and unremitting work, and that even so the reward may be long in coming.

What is astonishing is the almost universal belief held after the war that, notwithstanding the diversion of enormous productive activities from peace to war purposes—in other words, the destruction instead of the conservation of wealth—the world could go on in the same manner in 1919 as it left off in 1914. When it is remembered that wealth consists, not of money or credits, but of commodities or things which people need or desire, and that the war caused the destruction of untold wealth and withheld from production probably as much as was destroyed, and that as a result there is a great decline in the amount available for distribution, then it is obvious that every one, if the incidence of the burden is widely distributed, will have less for his own use. In other words, trade is bad, purchasing power is limited, or whatever expressions are used to denote that the heaped-up wealth (or commodities) of the world is smaller than we would all like and we have all to get along on less.

That there will be very sudden substantial revival of trade is not to be expected. The buying power of the world is still too enfeebled. And normal pre-war conditions cannot be restored anywhere until conditions on the Continent of Europe, first in the political and then in the economic sphere, have become stable.

While conditions have been improving for some time, many people have received an exaggerated impression of the recovery of British trade and finance from the steady rise of sterling exchange during the past six or nine months. This is a barometer which cannot be entirely relied upon. As a matter of fact, what appeared to be a rise in the value of the pound sterling has to some extent at least been really a fall in the value of the gold dollar in terms of commodities. Prices in the United States have been rising for the reason that credit there has been heavily inflated by huge importations of gold. An increase in currency or credit means a decrease in its value in terms of commodities or services, or in other words, a rise in prices. If prices rise in the United States and remain steady in Great Britain, that means that the gold dollar has fallen in value as against goods; that the pound sterling has remained fairly stable as against goods; with the result that the pound sterling has risen in value in exchange as against the gold dollar, or what would be a truer description, the dollar has fallen in purchasing power and has moved downward to meet the pound.

Nevertheless the commodity index numbers of the Board of Trade indicate a slight rise of prices in Great Britain and an improvement of trade. Taking 100 as the average price level in July, 1914, the tables published by the *Economist* show that the highest peak was 325 touched in March, 1920, and the lowest 163 in September last. There was a recovery in November to 167. That is, the cost of living in November last, so far as these figures can be relied upon, was 67 per cent higher than in July, 1914.

CLYDE SHIPBUILDING

A year ago the writer reported that shipbuilding had reached a period of stagnation from which there appeared to be no immediate escape, and that this industry by its nature could only resume the mantle of prosperity when all the other important industries had once more become busy and world-production circulating. Any signs of prosperity therefore in shipbuilding are indications of improved business in general. Mr. Leonard Ropier, president of the Shipbuilding Employers' Federation, thinks that the industry is at the point of recovery, which in his opinion will be slow. Orders are still very scarce, and those that have been accepted so unremunerative that, if taken alone, will perhaps prove a burden to the firms concerned. But they have been accepted even at a loss with a view to setting the ball rolling, and with the belief that these losses can be absorbed in the profits of resulting future work.

The past year has been one of readjustment, closed yards, and unemployed workmen. Wages are low compared with those prevailing during the war, and for a time after. In fact, in this industry and in others subject to world competition wages of skilled engineers have fallen much lower than those prevailing in occupations requiring semi-skilled or unskilled labour which are not subject to foreign competition. For example, road-building, the building trade, and the railways. It is certainly anomalous that unskilled labour in the latter occupations should be paid as much or nearly as much as skilled engineers in the former, because of foreign competition, especially when it is remembered that the high wages raise the cost of living to the others. In fact the relativity of wages in constructive occupations subject to foreign competition to wages in occupations involving no such competition has been receiving considerable attention lately in the press.

The United Kingdom in 1922 retained its place as the first shipbuilding country in the world, with Germany second and the United States third. In the past year the United Kingdom built 542 vessels of a tonnage of 1,043,000; Germany, 240 vessels of 631,000 tons; and the United States, 178 vessels of 259,000. The Clyde keeps its old-time supremacy in output, although with a very low total as compared with former years.

COAL, STEEL AND IRON

The year 1922 in the British coal industry has been one of a long struggle of the management of the collieries to put the industry on an economic basis, and to recapture the overseas markets which had been lost to the Americans in the great strike of three months in the spring of 1921 and the preceding period of unrest and extraordinarily high prices.

It is satisfactory to record that by midsummer the whole of the export markets had been recaptured by the British coal exporters, and when it is remembered that the export trade in coal, more than any other exports, pays for the imports of food which are essential to sustain the country, and contributes so largely to its prosperity, all concerned can be congratulated on their reconquest of this essential position.

On the other hand, the economic position of the pits in Scotland and probably Wales and the northeast of England, is still far from satisfactory. During 1922 the profits at the majority of the collieries were of the most meagre description, where they existed at all, and the purchasing power of the miners has been the lowest it has been for many years. Without going into any of the details of the settlement of the strike of nearly two years ago, there can be no doubt that the present economic position of both the collieries and the men, notwithstanding the immense activity of the export coal trade and the high prices obtained, has been largely caused by the reduction of the working day from eight to seven hours, with at least the same pay as before.

The weakest feature during the year in the industry has been the home market. A further reduction of railway rates will be of assistance here.

The exports of the whole country for the first eleven months of the year amounted to 58,243,000 long tons, at an average f.o.b. price at the shipping ports of 22s. 7d., or at the present rate of exchange $5.30 Canadian currency.

The steel trade has had a better time in 1922 than in 1921, but that is the best that can be said about it. The prospects are now much better. In 1921 the fortunes of the industry had sunk to a level which had not been approached for two generations. Almost any reasonable increase in production in 1922, therefore, which statistically would show a remarkable advance, would nevertheless be no indication that the clouds of depression had evaporated. And that is exactly what happened. The prospects at the beginning of 1923 are, however, encouraging. More stable prices are obtainable, and costs have been lowered to such an extent that exporters have found themselves once more in a position to compete in the world's markets, and these prices should tempt shipowners to place new tonnage, and this has already been done to some extent both on the Clyde and the Tyne. Shipowners cannot look for lower costs of raw materials, and unless individual output increases very considerably and rates for coal and transport come down, the price of steel is bound to advance. Cost of coal is up by 77 per cent over 1913, railway charges 73 per cent, and steel only 13 per cent.

The depression that the iron and steel industry of the country had reached is best illustrated by figures. In 1913 the production of pig iron was over 10,000,000 tons; in 1921, 2,600,000 tons; and in 1922, 4,000,000 tons.

The total exports of iron and steel last year reached 3,400,000 tons, or double the amount of the previous year, compared with 5,000,000 tons in 1913. Shipments to the eight principal European countries have been only half those of 1913, while shipments to countries in the Empire have risen to 72 per cent of such pre-war shipments—a significant tendency.

The production of steel ingots and castings for the whole of Great Britain for 1922 was 5,831,000 tons; for 1921, 3,703,000 tons; for 1920, the boom year, 9,067,000; and for 1913, 7,668,000 tons.

ENGINEERING AND MACHINERY

The building of marine engines so closely parallels the building of ships that the condition of one industry tells the tale of the other.

The locomotive building industry has been at an extremely low ebb so that thousands of men in this industry have been out of employment. The position has not been made any easier by the fact that India, on which the prosperity of the British industry has so largely depended in the past, is now desirous of having the work done within her own borders. Not only that, but contracts which are placed outside very often go now to Continental countries. Prospects are, however, brightening. One of the large companies in Scotland delivered locomotives to the Indian railways, to New Zealand, Rhodesia, China, and to railways at home. It has, furthermore, orders for the mechanical portions of a number of electric locomotives for Japan.

WOOL AND WOOL TEXTILES

The wool textile trade during 1922, in contrast with most other industries, has been active, with the values of raw material constantly tending upward. Employment has been good—far better than in 1921—and prospects for 1923 are encouraging.

In the early weeks of the year members of firms in the Scottish Woollen Trade Mark Association visited the United States and Canada, and the result was an increase of business with both countries, which manufacturers are hopeful of maintaining, even, in the case of the United States, in face of the hostile Fordney Tariff.

Conditions in Ireland

In the twenty-six counties the disorder which has grown in recent months, involving the destruction of railways and the interruption of services, has of course interfered with the normal flow of business in this area. In Northern Ireland, on the other hand, the population is not experiencing the same difficulties, and business conditions at the opening of the year are all favourable for a prosperous period ahead.

The official figures of the imports and exports through the Port of Belfast for 1922 show the improvement which is taking place.

Coal imported during the year totalled 1,175,000 tons, an increase of 170,000 tons upon 1921. Wheat and flour imports were about the same as 1921—70,000 tons and 80,000 tons respectively—and maize (Indian corn) totalled 166,000, an increase of nearly 7,000 tons. Iron and steel imports were about the same, but timber showed an enormous increase. Linen exported amounted to 30,200 tons as against 23,700 tons in 1921, and linen yarns 4,475 tons as against 2,617 tons. Tobacco exported amounted to 3,574 tons, and there were substantial increases in the tonnage of ropes, cordage and twines shipped from Belfast rope works.

The three largest industries in Northern Ireland are agriculture, linen and shipbuilding.

The agricultural outlook is bright. The average price of flax now ranges from 12s. 6d. to 20s. a stone. Farmers at these prices are securing a return of £90 to £110 per acre, or about three times pre-war prices.

The restriction upon the Irish cattle trade by the six-day period of detention—the same as fixed for Canadian cattle entering the British market—has caused considerable dissatisfaction in Ulster, and is considered unjust because Ulster does not rank as a Dominion, as does the South, and is subject to Imperial taxation.

The linen industry, which ordinarily employs 70,000 people in Northern Ireland, is facing the future with confidence. The export trade with the Dominions is growing, and it is believed that the time is not far distant when these countries will absorb as much of the production as does the United States, which in pre-war days took 50 per cent of the exports.

A cheaper and more abundant supply of flax would be of benefit, and it is interesting to note that Russia is resuming her old place as the greatest flax-producing country. The increase in the price of raw cotton is also beneficial to the linen industry.

The shipbuilding industry of Belfast is reviving, and several orders have recently been placed in these yards.

MANCHESTER AND THE CANADIAN CATTLE TRADE

Trade Commissioner J. E. Ray

Manchester, February 2, 1923.—The Markets Committee of Salford, which town, although a separate borough, adjoins the city of Manchester, is making arrangements in anticipation of the development of an important trade in cattle between Canada and this district. The Salford market is the second largest in England, and it is believed that with Canadian cattle routes via the Manchester Ship Canal, it should become a most advantageous centre for the distribution of meat throughout an area of 80 or 100 miles the population of which is one of the densest in the United Kingdom.

The market has accommodation for about 6,000 head of cattle and 30,000 sheep, while the Manchester Ship Canal it is learned can find accommodation for 2,000 head of cattle on landing. The market is a centre of congregation regularly of cattle salesmen and buyers from a radius of 100 miles.

It is understood that the committee has approached the High Commissioner for Canada, and that the latter has transmitted to the Prime Minister of Canada an account of Salford's value as a centre of distribution for Canadian stock.

It is hoped that the exporters of cattle in Canada will earnestly consider the advisability of studying Salford and Manchester's claims, as the latter certainly contain more promise of an extensive trade than many other ports of the United Kingdom.

GLUT OF HAY IN GREAT BRITAIN

Trade Commissioner J. E. Ray

Manchester, February 2, 1923.—It is learned that the exceptionally heavy shipments of hay arriving at British ports during the last few weeks have had an adverse influence upon prices, and it hardly seems likely that prices will improve until stocks are sold out.

It should be borne in mind that the demand is much smaller at the present time than it was in pre-war years. Moreover, it is considered unwise to flood the market at any given period. What is required is a steady influx weekly to meet immediate demands. One Manchester importer informs the writer that better prices could be obtained, and the trade would be more advantageously served, if Canadian shippers would regulate consignments. Of course, such a procedure is surrounded with obstacles, as if orders are placed by British importers, they are naturally executed by the Canadian sellers in accordance with contracts, and neither buyer nor seller can always foresee a glut. It would seem, however, that large quantities are often shipped on consignment, and thus the immediate demand becomes exceeded and a slump follows. The importer alluded to states that he would prefer about 200 tons a fortnight to arrive regularly during the season, and his contention is that other importers prefer to adopt similar methods.

RUBBER COMMODITIES IN THE BRISTOL AREA

Acting Trade Commissioner Douglas S. Cole

Bristol, January 29, 1923.—The United Kingdom being mainly a non-tariff country is the most highly competitive market in the world. Most Canadian firms are already well represented on this side, and when one considers such factors as advertising, overhead expenses in London for warehouse purposes, and local depots throughout the country, it will at once be realized that any company with a small capital should not endeavour to touch the area. Canadian firms already realize that in order to get sales in the United Kingdom it is absolutely essential that they have good-sized stocks in London which will be available on short notice, as quick delivery is of the first importance in a market where prices are cut to the quick. In this respect a manufacturers' agent is unfortunately outclassed and can be of little value to a Canadian rubber manufacturer who hopes to operate through such a channel, thus escaping heavy expenditure.

Prices quoted in this report for tires and accessories are wholesale list, without special discounts, and have been furnished in good faith by reputable firms. Exchange is taken at the most recent rate of $4.65 to the pound sterling throughout the report.

I. PNEUMATIC TIRES

The sale of pneumatic tires, particularly in the Bristol area—which includes the West of England, South Midlands, and South Wales—is very quiet at the present time—so quiet, in fact, that one Canadian company have decided to give up their local depot due to the fact that the local trade is largely retail and their wholesale house here is not justified by the volume of trade. Price-cutting has been continuous since September, 1920, and the following wholesale prices for a popular Canadian tire, size 30 by 3½, will give some indication of the great reduction and loss in deflating inventories, and owing to the fact that a certain part of the pneumatic tire trade has been cut to pieces by American competition of the cheapest sort:—

	£	s.	d.	Canadian Currency
September, 1920	8	9	6	$39 41
April, 1921	6	7	6	29 64
October, 1921	5	8	6	25 23
February, 1922	5	3	0	23 95
January, 1923	3	7	6	15 69

One American firm is selling a similar size tire for £2 5s. ($10.46), which it will be seen is far less than the wholesale price of the Canadian company. Canadian prices, it should be stated, are not excessive and undersell many of the English makes.

The huge plant of the Dunlop Company at Port Dunlop is just outside Birmingham. Sales of pneumatic tires of Canadian and United States origin are accordingly always difficult.

PNEUMATIC TRUCK TIRES

There is but little demand for the pneumatic truck tire in this area. Weymouth, however, it is understood, has a small demand owing to the char-à-banc trade. In England there is not the same demand for such tires as the roads are for the most part well metalled.

MOTOR CYCLE TIRES

Dunlops control approximately 85 per cent of the business in this country owing to the fact that they have acquired contracts for the original equipment

of practically all makes of motor cycles. The following are the wholesale prices for covers of a well-known Canadian firm in this area and are the same as Dunlops in all essential respects:—

	£ s. d	
26 x 2½ x 2¼	1 7 3	$ 6 33
26 x 3	1 11 0	7 20
28 x 3	1 14 0	7 90
*27 x 3½	1 19 3	9 12
*29 x 3½	2 6 0	10 69

* Over sizes for 26 x 3 and 28 x 3 respectively.

PNEUMATIC INNER TUBES

It is found that the red inner tube is much more popular with the English motorist than the grey type. One firm of manufacturers informed the writer that when they found the sale of their grey tire was not meeting with success, they made up a red tube identical in quality and price for which they now find a wider sale, the difference being simply one of pigment.

The wholesale prices of a well-known make of motor car inner tubes at the end of the calendar year were as follows:—

	s. d.			s. d.	
28 x 3	6 6	$1 51	31 x 4	10 0	$2 32
30 x 3	7 6	1 74	32 x 4	10 6	2 44
29 x 3½	7 9	1 80	33 x 4	10 9	2 50
30 x 3½	8 6	2 02	32 x 4½ from	12 6 to 13 9	2 91 to 3 19

Inner Tubes for Motor Cycle Tires

	s. d.			s. d.	
26 x 2½	5 6	$1 28	27 x 3½	7 3	$1 68
26 x 3	5 9	1 37	29 x 3½	7 6	1 74
28 x 3	6 3	1 45			

One factor which Canadian manufacturers should keep in mind is the great prevalence of the small car of low horse-power which is popular owing to the heavy taxation based upon horse-power rating. This has engendered the use of a number of small and odd sizes of tires, and has had the effect also of making the motor cycle and side car very popular as compared with the pre-war cheaper type of automobile.

Mention has been made above of the better sale of red inner tubes for motor cars and cycles, but the Dunlop firm state that for bicycles the demand is almost exclusively for the grey tube.

Owing to the dumping of various types of American tires, the tire trade has largely been demoralized during the past year, and the matter is so serious that it has meant very great hardship for certain manufacturers in England.

II. TIRES OTHER THAN PNEUMATIC

The well-metalled roads in the United Kingdom have made the use of the solid tire very extensive. Motor trucks, which include the many thousands of trade vehicles, char-à-bancs, and motor busses, are largely equipped with solid tires. The trade in these is very largely controlled by the Dunlop, Avon, and MacIntosh companies, although there is one German make which is gradually regaining some lost pre-war business.

This trade is a specialty one, and for some reason appears to present many obstacles for Canadian competition, whilst prices at the present time are very low owing to excessive competition and the apparent unloading of surplus war stocks.

A local owner of a fleet of motor char-à-bancs states that in spite of the good roads he much prefers the large pneumatic tire to the solid tire, on account of the greater comfort to the passengers as the former reduces the jolting. The initial cost is of course greater, but it is counteracted by a slightly higher charge for hire.

III. MECHANICAL RUBBER GOODS

Belting.—It may be doubted if there is much possibility for Canadian manufacturers of belting, as the trade is largely "made to order." An English purchaser would have to wait six to eight weeks for Canadian delivery, whereas English competitors can deliver in a fortnight.

Balata and leather belting are of course extensively used, the former particularly so as it will stand up under bad conditions of moisture and in a heavy steam atmosphere under which so many factories work. For this reason it is even superior to leather, which will not stand the strain, and deteriorates more rapidly than balata.

Rubber belting is not used extensively on this side, except for the smaller business needs such as agriculture. Also English firms who supply belting make it an exclusive product and specialize in it, which accounts for their considerable success.

A firm in close touch with the trade in this area state that Canadian competitors in this line stand a very small chance unless large stocks are carried in London, which would not be feasible owing to the large amount of capital it would involve. His frank opinion was that Canadian firms would do much better and compete much more successfully by going after small industrial and agricultural needs.

Hose.—Imported hose of the size used by the man with a small garden is quite popular, particularly so as it comes in 250 and 500-foot lengths. This is a great advantage, as apparently the English manufacturer makes lengths only up to 60 feet. Price and quality are naturally the deciding factors, but this is one line in which United States manufacturers are doing well.

One United States manufacturer is endeavouring to build up the sale of hose of the cotton thread insertion type which is made up for distributors, with the distributor's name appearing on the tube. This applies to many types, not only the garden variety but the substantial tubes for heavier usage and capacity.

Matting.—There are some importations of rubber matting into this area which find a ready sale as this is a stock product which can be very easily carried by any firm of distributors. It comes in rolls and is not a large space consumer.

IV. WATERPROOF CLOTHING

As this area is a large exporter of waterproof clothing of various types, and Bristol has a very well equipped factory, conditions are unfavourable for the importation of Canadian waterproof clothing, particularly as the quality of the English manufacture is exceedingly high, whilst prices are very low.

Demand, however, in this market is for a light-weight article for damp weather as heavy rains are not as common as in Canada. No encouragement can be given in this direction at the present time.

V. RUBBER FOOTWEAR

Canvas Boots and Shoes with Rubber Soles.—For this area the Canadian firm that has a London agency carrying good stocks of their products which can be shipped at short notice can do a very nice trade. One large manufacturer and jobber stated he would be very glad to receive quotations from Canadian

firms who could give quick delivery of "Wellingtons" and hip boots for men and "Wellingtons" for women; also quotations are desired on children's and misses' rubber overshoes.

Messrs. Hoods and the United States Rubber Company practically control the trade in this area, but any Canadian firm who make an attractive article and price being right—and there are several—can do a very nice trade, the essential point being, however, central stocks upon which wholesalers can draw. Competitive wholesale price in women's rubbers is 2s. 6d. (52 cents—exchange $4.65) per pair, sizes 3 to 8; whilst the wholesale price of men's overshoes is in the vicinity of 3s. (70 cents), sizes 6 to 11.

Golf and Tennis Shoes.—One line which has achieved great popularity is golf and tennis shoes with crepe rubber bottoms, the crepe rubber being rubber in its natural state and colour, which closely resembles in appearance the outside of a sponge. It is claimed that these crepe rubber bottoms wear far better than the usual corrugated rubber soles so popular in Canada.

Gym and Tennis Shoes.—For an ordinary popular-priced gym shoe the wholesale price must be 2s. (46 cents) or under per pair, white, for women's size 3 to 8. Practically the sale of this low-priced shoe is to women exclusively.

Bathing Shoes.—The only extensive sale of bathing shoes is for the cheapest canvas type which would sell in the vicinity of 1s. to 1s. 6d. (46 to 58 cents) per pair and which would not outlast the season.

Rubber Heels and Soles.—One Canadian manufacturer has already a considerable sale to the retail trade in England in rubber soles and heels, particularly for ladies, although for the most part the English product, which is extensively advertised, receives the bulk of the trade. This again is a specialized trade, and as the English type of shoe does not conform to the Canadian and American model, it is necessary that a thorough knowledge of the market be gained before attempting to export to this side. Pre-war there was a very large sale of United States makes of rubber heels.

VI. MISCELLANEOUS RUBBER PRODUCTS

Bathing Caps.—There is a large demand for the attractive highly coloured American bathing cap which is far superior in appearance and far lower in price than English makes. The English manufacturer goes in for a bathing helmet which, while not so attractive as the American, will generally keep the water out better, but on the whole the younger generation of English girl desires attractiveness rather than utility. The prices range all the way from 4s. 11d. to 48s. ($0.95 to $11.16) per dozen, depending upon the quality, style and attractiveness.

Hot Water Bottles.—Owing to the method of heating by fireplaces rather than by the central system, hot water bottles, far from being a luxury, are a necessity and are in common use. One firm, which handles in the vicinity of 15,000 hot water bottles per annum, state that of these 14,000 are of the type having canvas insertion, which they find is demanded for the sake of safety, and the all-rubber American hot water bottle is considered somewhat unsafe. The remaining thousand are divided between a popular French make (Hutchinson) and the many American makes, such as Goodrich, which are on the market at the present time. The wholesale price for hot water bottles is from 3s. 2d. (74 cents) for the 12-inch x 8-inch, with or without canvas insertion. Good bright colours such as attractive reds and pinks are popular as there is a fallacy that red rubber is more durable than grey rubber.

A method which is in common vogue for buying hot water bottles is by the pound rather than by the unit, and the wholesale price is in the vicinity of 3s. 6d. (82 cents) per pound, this being a competitive price for English bottles at the present moment.

Invalid Cushions.—Again red is the popular colour and the demand very good for sizes 12, 14, 15, 16, 18 and 20-inch. These are all of rubber with no canvas insertion, and are purchased by unit and not by weight. The competitive wholesale price is 4s. 3d. (approximately $1) for the popular size, 16-inch.

Football Bladders are purchased by the pound, and one firm who stated in good faith that literally tons were purchased by them each year, quote a competitive price in the vicinity of 3s. 6d. (82 cents) per pound for all red bladders in sizes 1 to 5, for the type used in Association football, there being but small demand for the Rugby shape. The Match size is No. 5 and is the most popular size for this market.

Household Gloves.—The demand for surgeons' gloves is extremely limited, but for household use there is a constant and ready demand for the red and pink varieties. The wholesale prices of these must be in the vicinity of 12s. per dozen pairs ($2.79). These are the ordinary type of gloves as are sold in Canadian 5, 10, and 15-cent stores at 15 cents each. Canadian producers who can quote this price free delivered in Bristol should find a very satisfactory market in this area.

CONCLUSION

As a result of war conditions, 1918 found the various manufacturers of the Allied countries, and particularly the United States, with capacity for various rubber goods far greater than the world demand in normal times. There are two systems which these manufacturers could have operated on: first, cut their production to what would be to them a normal trade and decrease their output; or secondly, manufacture to capacity, selling the normal market demand in their own country at a normal price, and unload their surplus production wherever dumping is permitted. The United Kingdom, as a free trade market, has had a full experience of the second type of manufacturer and as a result in practically all lines, prices are exceedingly low.

The development and exploitation of a market such as the United Kingdom is an expensive business, and it cannot be over-emphasized that only those manufacturers who are prepared to undertake the upkeep of central quarters with full lines of products in which they specialize, and where necessary, depots throughout the country, can hope to do a large trade. In druggists' sundries Canadian goods in this area will be welcomed and are certainly more desired than United States goods, provided prices are competitive and stocks readily available.

TRADE AND INDUSTRY OF BRITISH GUIANA

Mr. E. H. S. Flood, Canadian Trade Commissioner in Barbados, writes under date February 7, 1923, that the published statement of the exports of the principal products of the Colony of British Guiana for 1922 shows the important increases to be in lumber, shingles, railway sleepers, coffee, rice and coconut products, and decreases to be in balata, citrate of lime and sugar. This latter, which is the most important export of the colony, fell off some 18,000 tons. The large increases in the export of rice and diamonds to a great extent offset the decline in sugar.

The Department of Lands and Mines report that during the quarter ending December 31, 1922, there was an increase in the diamonds obtained as compared with 1921 of 61,036 carats; for the full year the total find was 159,426 carats valued at $3,859,357. Gold mining has been growing less productive each year, the quantity obtained last year being only 8,972 ounces.

GERMAN INDUSTRIAL AND TRADE SITUATION

Trade Commissioner L. D. Wilgress

Hamburg, January 21, 1923.—The French occupation of the Ruhr area has reacted considerably on German industry, and it is probable that the continuance of the present position will adversely affect the ability of German manufacturers to compete on the world's markets. The most immediate effect has been a rise in the price of coal. The Ruhr area produces about 76 per cent of the German total coal output. It is estimated that the production of the other coal districts of Germany is not sufficient for the requirements alone of Berlin and vicinity. Any diminution in the supplies of Westphalian coal must therefore compel unoccupied Germany to rely to an increasing extent upon imported coal. Already arrangements are being made to buy increased quantities of British coal.

According to a *Times* report, coal exporters in Hull, Newcastle, and South Wales are receiving extensive inquiries from Germany. As a result, South Yorkshire best steam hard coal increased over 6d. per ton in price during last week, being quoted on January 20 at 26s. 9d. per ton f.o.b. Hull, while the freight rate from Hull to Hamburg on that date was 4s. 9d. per ton. In Germany the events in the Ruhr brought about a sharp rise in the price of coal, even before the collapse of the exchange rate. Thus in Saxony the price of Westphalian coal increased from 57,000 marks per ton on January 10 to 68,000 marks on January 12. On the latter date English coal cost in Saxony 85,000 marks per ton.

It is evident that, with greater dependence upon imported coal supplies, German industry will be less able to compete effectively for export orders. Any rise in the price of coal automatically increases the price of manufactured goods. With diminished supplies of Westphalian coal, the cost of production of manufactured goods will be regulated to an increasing extent by the cost of imported English coal. The price of iron in Germany now exceeds the world-market price, and according to an agreement made two years ago every rise of one mark in the price of coal raises the price of iron by 2·75 marks. Orders for iron have recently been placed abroad. On nearly all other lines of manufactured goods German prices are approaching the gold or world standard. The official index number of wholesale prices showed an increase in December of about 28 per cent over that of November. On January 5 the index number was 1,670 times higher than in 1914, while on the same date the dollar was quoted at about 2,125 times the pre-war rate. It would appear, however, that the effective ability of German manufacturers to undersell foreign competitors is being gradually curtailed.

German industry may derive some advantage in export trade from the recent fall in the exchange value of the mark. This advantage would chiefly accrue to the manufacturers of products in which labour accounts for a large proportion of the total cost of production, since labour costs rise more slowly on a falling exchange than the cost of fuel and raw material. It is chiefly in such products that Germany has recently been underselling foreign competitors.

The exchange rate for the dollar, after slowly rising during the early part of January from around 8,000 to 10,000 marks, commenced on January 15 one of the periodic violent movements which have of late become characteristic of the mark exchange. In a few days the rate went as high as 24,000 marks to the dollar. There has since been a recovery and the rate is now fairly steady at around 22,000 marks.

TRADE STATISTICS

The official statistics of the foreign trade of Germany are of little value as an indication of the turnover of trade with foreign countries. According to the

figures recently issued, the total quantity of goods imported during the period January to November, 1922, amounted to 41,551,043 metric tons, of which agricultural and forest products accounted for 10,176,082 metric tons. Exports during the same period amounted to 19,800,243 metric tons, of which 1,464,067 metric tons consisted of agricultural and forest products. The following table taken from *Wirtschaftsdienst* shows the most considerable classes of import and export month by month from January to October, 1922, with the monthly average for each class in the years 1913 and 1921:—

Imports and Exports into and from Germany

	Import			Export			
	Pit Coal 1000 Tons	Iron Ore 1000 Tons	Copper 1000 Tons	Cotton 1000 Tons	Paints, Chemical and Pharmaceutical Products 1000 Tons	Iron Goods 1000 Tons	Machinery and Vessels 1000 Tons
1913 Monthly Average	878.3	1,168.8	18.75	48.6	408.6	541.9	59.6
1921 Monthly Average	78.5	576.5	10.00	29.4	150.0	204.0	47.0
1922—January	194.1	837.7	16.60	23.4	226.5	221.7	48.7
February	162.7	409.2	8.60	17.9	255.0	172.7	54.7
March	285.0	713.8	19.00	28.3	195.9	212.0	56.5
April	336.9	757.0	23.70	31.6	259.1	200.7	53.0
May	333.7	1,446.5	29.80	32.3	263.2	209.4	54.4
June	789.8	1,054.0	18.20	27.2	204.1	213.2	56.9
July	1,542.2	902.0	16.40	31.2	237.6	212.4	50.7
August	1,721.2	940.0	15.10	26.6	214.4	198.4	59.9
September	1,815.0	996.0	16.90	19.0	260.3	244.0	52.1
October	2,146.2	1,220.0	14.10	16.0	206.5	246.1	61.9

It will be seen from the above table that Germany is now importing over twice as much coal as in 1913.

GRAIN TRADE

There was a great advance in the domestic prices of grain during the past few weeks. Rye, which at the end of December was quoted in Berlin at 14,800 marks a centner (110 lbs.), is now 34,000 marks a centner. With the advance in price, the mills find it more and more difficult to finance grain purchases, and buy only a few days' supply at a time. It would appear that the surplus of last harvest is nearly exhausted, and imported grain will have to be drawn upon to an increasing extent. The fall in the value of the mark increases the difficulties of the Government in arranging for the purchases of foreign grain, but further large supplies will have to be ordered in the near future. The German oatmills are no longer able to compete on the British and Scandinavian markets, owing to the great increase in price of German rolled and flaxed oats and oatmeal. There has therefore been a falling off in the demand for Canadian oats. Maize continues to be in demand, and besides the United States, Argentina, South Africa and Roumania are shipping maize to Germany. From the United States the chief grade shipped is mixed No. 2.

German farmers are not able to treat the soil with the same quantity of artificial fertilizers as before the war. This is given as one of the reasons for the relatively small yields in recent years. With the loss of important grain and potato districts to Poland, Germany has to rely to a much greater extent upon imported food supplies, while the density of population on the present area of the country is more than in 1913.

The domestic demand for agricultural implements, which has kept the German factories fully employed since the war, would appear to be gradually lessening as the farmers have completed the renewal of their stock of implements. The depreciation of the mark led the farmers to invest their savings in agricultural machinery and implements, and in this way the worn-out equipment has been replaced by new implements. Henceforward, it may be expected that there will be a decrease in the buying of agricultural implements by German farmers.

CONDITIONS IN THE UNITED STATES

FREDERIC HUDD, TRADE COMMISSIONER IN THE UNITED STATES

New York City, February 15, 1923.—Present business conditions here give no ground for dissatisfaction. Industrial activity has not slackened, and it is now up to the limit of the labour supply. While the expansion of business has steadily continued, there are no evidences of over-production. Mail order houses are reporting increases on net earnings as against deficits last year. Railroad earnings have increased and car loadings are now the highest on record with the exception of one week in March, 1920. Unexpectedly large orders have been placed for new equipment, but even with manufacturers of locomotives, etc., working at capacity, it is not considered possible to catch up with requirements this year.

INDICATIONS OF ACTIVITY

Automobile manufacturers are expecting a record output on the face of present bookings. There is also increased demand for building materials, which indicates that building operations this spring will exceed those of the corresponding period last year. In the textile industries there are heavy advance orders which are reflected to some extent in higher prices, which are more particularly due to advances in the cost of raw materials. Stocks of wool are diminishing, and it is reported that the cotton crop has fallen short of 10,000,000 bales. Woollens for delivery in the second half of the year have been ordered at prices running up to 15 per cent over last season's prices. Cotton goods are from 15 to 40 per cent higher. European conditions have affected the price of grains unfavourably, and the delayed movement of farm products, together with advances in the cost of necessities, has adversely affected the farmer.

THE STEEL INDUSTRY

There is the most marked activity in the steel industry, which is running as high as 90 per cent of capacity in some mills. Shortage of labour prevents a greater percentage of output. Production of steel ingots in January was at a rate of about 43,500,000 gross tons a year, the highest rate since March, 1920. There was a gain of about 9 per cent over the rate in each of the last three months of 1922, a gain of about 28 per cent over the average rate last year, and a gain of 126 per cent over the rate in 1921. Unfilled orders on the books of the United States Steel Corporation on January 31 showed an increase of 165,073 tons over the preceding month. Orders on books were 6,910,776 tons against 6,745,703 tons at the end of December. This compares with 2,421,678 tons a year ago. Some independent steel companies are now charging a premium for prompt deliveries. In addition to the large bookings, payments are prompt and prices firm.

EXPORT TRADE

Statistics of the foreign trade of the United States for 1922 indicate that the value of exports for the year was $3,831,516,735. This is $65,514,621 less than the value of exports in 1921, and $1,347,498,000 greater than the value of exports in 1913. A striking feature of the export of foodstuffs in 1922 was the large exportation of sugar from American refineries, which reached a total of nearly two million pounds, or more than twice the quantity exported in the previous year and almost three times that of pre-war years. The exports of corn, rye, oats and oatmeal increased, while there was a 40 per cent decrease as compared with 1921 in the exports of wheat. These changes were primarily

due to prices, and another consideration was the increased demand in Europe for low-priced cereals, on account of the shortage of coarse grains for live stock food and the increase in the consumption of these grains for human food. Canadian wheat has been a very strong competitor in the wheat market since the beginning of the harvest. There has been a marked increase in the export of dried fruits and canned goods, which is now almost twice as great in volume as in pre-war days.

Any effect which the European situation may be having upon export business is not evident in the stock market. Neither have there been noteworthy fluctuations in foreign exchange rates. Canadian funds in New York remain at slightly over 1 per cent discount.

THE SUGAR SITUATION IN 1923

Frederick H. Palmer, Assistant Trade Commissioner in the United States

New York City, February 15, 1923.—The Secretary of Commerce, in speaking of the sugar situation, stated that while the estimated consumption of sugar this year would exceed the probable production, there was no cause for alarm in the situation because of the large carry-over from last year's crop.

The third semi-annual report of the Department of Commerce on the sugar situation, issued on February 9, predicted a striking increase of about 350,000 tons in the amount of sugar that would be consumed this year as compared with the consumption in 1922, while production is estimated to show an increase of only 120,000 tons. Very naturally this pronouncement caused a good deal of apprehension among firms engaged in the business, who assumed that these statistics suggested the possibility of a shortage.

The more stable of these firms criticised the accuracy of the estimates made of production and consumption, but at the same time asserted that such statements issued by the Government could go far toward creating a repetition of the conditions obtaining in 1920, and few firms desired to repeat the disastrous experience of that year. It was to remove this shadow of an acute situation, by supplementing and clarifying the published statistics, that Mr. Hoover made his statements.

The official estimates of production and consumption for 1923 are 18,308,000 and 19,035,000 tons respectively. This incomplete statement of the situation certainly indicates a possible shortage, but Mr. Hoover declares there is no cause for alarm because of the 1922 carry-over, which amounted to 1,203,000 tons. When the carry-over is considered in connection with the above estimates of yield and demand, a surplus of 476,000 tons should be left at the end of 1923.

As to the accuracy of the estimates, the only other reports that have been issued proved to be very nearly correct.

Canadian Manufacturers and Exporters are strongly advised to file all numbers of the "Commercial Intelligence Journal" for future reference, and to bind them with the Index at the end of each half year.

OCEAN-BORNE TRADE OF THE UNITED STATES IN 1922

St. John Betts, Office of the Trade Commissioner in the United States

New York, February 16, 1923.—According to an analysis issued by the United States Shipping Board, ocean-borne commerce of that country increased by more than 4,000,000 tons during 1922 as compared with the previous year. There was an increase of nearly 10,000,000 tons in inward-bound business, and a decrease of 5,000,000 tons in outward-bound.

Ships under the United States flag carried less than one-third of the business of that country, and there was a noticeable increase in the transportation of United States cargoes in ships under foreign flags, other than British. Of the total ocean-going commerce in 1922, 47½ per cent was carried by United States ships in comparison with 49 per cent in 1921, but these figures included the trade with adjacent countries, which is practically coastwise, as well as the enormous traffic in bulk petroleum, in both of which United States ships predominate.

The tanker movement for the year totalled 25,500,000 tons, an increase of 2,000,000 tons for the year, but in the export trade United States ships carried an average of 36 per cent of the oil as compared with 40 per cent in 1921. At the beginning of the year, according to the Board's report, 88 per cent of the country's export oil was moved in tankers under the United States or British flag, but this was reduced to 76 per cent at the end of the year. Commenting on this decrease, the report says: "American owners are acquiring new tankers under such flags as will permit the cheapest operation. To-day this brings about the registration of tank steamers under the German flag particularly."

The decrease during 1922 in the overseas cargo movements was accounted for largely by the great exports of coal necessitated by the British coal strike of 1921, according to the Board, and by the fact that the normal shipment of export coal during 1922 was prevented by coal strikes in the United States. Overseas import of dry cargoes increased from less than 7,000,000 tons in 1921 to more than 13,000,000 tons in 1922, the amount of overseas imports for the last three months of the year being twice the amount for the corresponding period in 1921. "This would seem to indicate," the Board states, "that the new tariff has not had any serious effect upon the import trade of the United States, although ships under that flag have been steadily losing ground therein in comparison with their foreign competitors." In 1921 United States vessels carried 37 per cent of overseas imports, while for 1922 this figure dropped to 28 per cent.

In spite of the advantages of commerce with nearby countries, American ships carried only 48 per cent of the inbound cargoes as compared with 53 per cent in 1921, and 53 per cent of the outbound movement as against 58 per cent for the previous year. Of the inbound commerce from adjacent countries for 1922, outside of the 48 per cent carried by vessels under the flag of the United States, 15 per cent was transported in British vessels. In this trade, ships under foreign flags, other than British, were found by the board to have gained a strong foothold, and although the trade itself is almost wholly American, it was noticed that when United States shippers charter additional tonnage to meet the seasonal peaks of the Caribbean trade, the more cheaply operated Scandinavian ships can underbid their rivals.

AGRICULTURAL AND MARKET CONDITIONS IN SOUTH AFRICA

Assistant Trade Commissioner J. Cormack

Cape Town, January 11, 1923.—Orders are now being placed more freely than for many weeks past, and this is particularly true of the mining concerns. The reappearance on the market of the representatives of De Beers, who have once again been buying supplies after an interval of nearly two years of inactivity, is significant. The fact that when the Johannesburg Commercial Exchange reopened this year it experienced two of the busiest days for a considerable time past affords an indication that the mines have come within a measurable distance of the exhaustion of their old stocks, and are once more in the market for replenishments. There is also a manifest disposition on the part of buyers to place orders more freely through local firms for import than has been the practice in the past. Farmers, and storekeepers in the country districts (who are sensitive to the fluctuations of the business barometer) appear to find encouragement in the immediate prospects. A storekeeper from the high veld states that he had never seen the Transvaal look so well as regards crops, and provided there is no setback and no serious shortage of rain, the harvest should be an excellent one—certainly the prospects are a lot brighter than they were last year. Conditions in other parts of the country have been unsatisfactory, more particularly during the final stage of growth, when the crop was damaged by heavy rains. In some districts the loss on this account was severe. It is not expected that the new yield of wheat will furnish more than 2,009,000 bags, a shortage of 596,000 bags as compared with 1921.

A fair amount of business is being done in agricultural implements and machinery and fencing materials; the price of the latter are moving downward. Inquiries in iron and steel lines are more numerous and on a larger scale as regards quantities than for some time past, and merchants are anticipating a considerable improvement in business with the turn of the year. Large shipments of Baltic timber have recently arrived at Cape Town, where the demand for the material is increasing. Other descriptions of timber are also in good supply. Imported cement continues to find a market at the Coast Ports, but is apparently unable to compete at inland centres. In hardware and cutlery business is reported as fair and prices generally remain steady. In dry goods and clothing the market is dull, but a favourable feature of recent months is the reduction which has been effected in stocks purchased at high prices. It is felt that the decrease in the number of forced realizations is an indication of more normal and stable conditions in the near future. Prices show a tendency to harden.

THE LUMBER INDUSTRY IN PORTUGAL

The lumber industry is active in Portugal, at some risk, however, of the depletion of the country's timber resources, says the United States *Commerce Reports*. It is said that 5,000,000 cubic meters of wood are burned annually as fuel, or converted into charcoal. The timber resources of Portugal consist of 1,927,000 acres of pine, 210,000 acres of chestnut, and about 1,235,000 acres devoted to oak and cork oak trees. Before the war Portugal had a reclamation plan by which 1,235,000 acres were to be planted to timber, and at present in the whole Republic it is said that there are less than 74,000 acres of barren land. Of the total area, it is said that 22 per cent is devoted to timber, but at present Portugal is only maintaining its announced reclamation and reforestation plan at one-third its former efficiency. The area production of cork is said to be about 864,000 acres at present, which was expected to produce for export 65,000 tons during 1922.

CEYLON'S IMPROVING TRADE

Trade Commissioner H. A. Chisholm

Calcutta, January 11, 1923.—The end of the year finds general trade conditions in Ceylon much better than at any period during the past two years. Only four months ago trade in Colombo was stagnant. To-day trade is actually buoyant not only in sentiment but in fact. This rapid transformation is undoubtedly attributable to the recent rise in the price of crude rubber following the policy adopted by the rubber planters of the East of restriction of output. Ceylon's prosperity depends almost altogether upon profitable tea and rubber prices. Throughout the greater part of 1922, Ceylon has been able to sell all her teas at rates which meant prosperity to the tea estates. Now the rubber plantations, which have been languishing, can also operate on a profitable basis and are busy purchasing operation supplies which they were unable to afford in 1921-22.

INCREASED EXPORTS OF TEA AND RUBBER

On the whole, 1922 has been a good year in the Ceylon tea industry. While shipments are still below those of the war and pre-war years, nevertheless, in spite of finer plucking which operates as a restriction upon output, exports of teas from Ceylon during 1922 show an advance over 1921 not only in value but in volume. The total exports from January 1 to December 18, 1922, were 162,245,000 pounds, as compared with 156,258,000 pounds during the corresponding period of 1921.

Notwithstanding the unprofitable rubber prices ruling throughout the greater part of 1922, Ceylon's rubber output for the year has created a record. From January 1 to December 18, 1922, over 103,000,000 pounds of rubber were exported from Ceylon, as compared with 90,000,000 pounds in 1921, 100,400,000 pounds in 1919, and 28,000,000 pounds in 1913.

RECORD IMPORTS OF TEA AND RUBBER CHESTS

A feature of Ceylon's import trade in 1922 has been the record purchases of tea and rubber chests, as compared with previous years. During the calendar year 1922, some 1,044,000 tea and rubber chests were imported, as compared with 567,000 in 1921, and 908,000 in 1919. Japan has increased her dominance in this trade. In 1922, imports of Japanese chests numbered 887,000, or 85 per cent of the total, as compared with 70 per cent in 1921 and 79 per cent in 1919. Most of the remainder come from the United Kingdom.

Nearly all the Japanese chests are of Momi wood, which is similar in appearance and texture to white pine. In view of the fact that Japanese Momi chests remain high-priced, while 3-ply wood has shown some reduction in price, Colombo merchants are showing more interest in the possibility of importing Canadian shooks. British Columbia exporters of solid and 3-ply shooks should take this opportunity of submitting their prices to importers in Colombo. Details of the requirements of the Eastern markets for 3-ply tea shooks are set down in *Commercial Intelligence Journal* No. 961 (July 1, 1922).

INCREASED IMPORTS OF IRON GOODS

Ceylon's imports of iron goods, nearly all of which come from the United Kingdom, more than doubled in 1922 as compared with 1921. Imports of hoop iron increased in volume from 17,000 cwt. to 35,000 cwt; of nails and rivets,

from 13,000 cwt. to 17,000 cwt.; of galvanized barbed wire, from 3,400 cwt. to 13,000 cwt.; of galvanized iron, from 13,000 cwt. to 62,000 cwt.; of angles, bars and flats, from 7,800 cwt. to 8,700 cwt. Some 327,000 cwt. of cement were imported as compared with 176,000 cwt. in 1921. The United Kingdom lost 60 per cent of this Ceylon trade to Germany and Japan. Ceylon's increased consumptive capacity and prosperity are further evidenced by record imports of kerosene, oil, sugar, rice, and matches.

TRADING CONDITIONS IN SINGAPORE

K. L. Carruthers, Office of the Trade Commissioner

Singapore, December 30, 1922.—During the month of November the total value of the imports into British Malaya was two million dollars more than for the same month last year, and four millions in excess of the aggregate for October. Exports also show an increase to the extent of four million dollars above the total value of the corresponding month in 1921, although at the same time there is a decrease of one million dollars when comparing the figures with those of the preceding month.

The published figures for November (exclusive of coin and bullion) are as follows:—

	Imports	Exports
Live animals, foods, drinks and narcotics	$18,615,876	$ 8,777,681
Raw materials	13,781,266	32,529,895
Manufactured articles	9,679,010	3,556,768
Total value of merchandise	$42,076,152	$44,864,344

It will be noticed that a favourable balance exists of the value of exports over imports on the month's trading. This has been general throughout the year, and during the period January-November, 1922, imports were valued at $428,797,721, while the value of exports amounted to $453,445,832. A large increase in the import of cotton piece goods is reported during the month in review. Cigarettes also show a substantial increase in shipments. The quantity of coal imported has dropped from 44,132 tons as recorded for October to 10,070 tons for this month.

In exports, the shipments of preserved pineapples were more than double those of the previous month. All other classes of goods in large demand remain at about the same figure as in October.

No imports are recorded from Canada; but exports of tin, preserved pineapple, tapioca, pepper, and rattans to a value of over $72,000 are shown.

The following are the figures of the export of rubber from all ports in British Malaya for the first ten months of this year and also for the same period in 1921. Figures are in centals of 100 pounds.

	1922	1921
United Kingdom	652,097	838,641
United States	3,746,164	2,005,414
Europe (Continent)	352,463	131,854
British Possessions	72,931	58,871
Japan	318,563	414,785
Elsewhere	3,731	1,863

It will be seen that there was a net increase over the same period of last year. The total value of the rubber exported to date this year is $142,969,000 as compared with $101,155,000 for the corresponding period for the year 1921.

MALAY RAILWAY ROLLING STOCK

According to the report of the Federated Malay States Railways for last year, twenty "L" class locomotives from the North British Locomotive Com-

pany, Ltd., Glasgow, and ten "R" class locomotives from the Baldwin Works, Philadelphia, were received, together with ten "E" class engines, ordered for the construction department in 1920. At the end of the year the open-line locomotives, including four steam rail motors, numbered 233, against 204 in the previous year. Seven new bogie passenger carriages were built at the works, and twenty mail-type bogie passenger carriages were under erection at the end of the year. Twenty-eight bogie goods wagons and sixty-three wooden wagons were also built. In addition, 160 steel covered goods wagons forming part of the 500 ordered from England in 1919, were erected at Port Swettenham by Messrs. D. C. Robertson & Co. Two weighbridges were erected, one of 60 tons at Seremban and the other of 20 tons at the general stores, central workships, Kuala Lumpur. A 60-ton weighbridge for the workshops was received but was not erected.

SIAM

The total value for the imports for the month of November shows an increase of slightly over 500,000 ticals, compared with the preceding month; the exports for the corresponding period also show an increase, viz. 741,119 ticals. The following figures show the quantities of rice exported from Siam for the period from January 1 to November 30:—

	1922	1921	1920	1919
	Piculs	Piculs	Piculs	Piculs
To Europe..	738,719	4,095,385	85,581	1,362,575
Elsewhere..	15,904,004	14,214,830	115,707	12,139,475

The general report on the paddy is that the crop is "doing well" and in several cases is being harvested.

The mining districts in Siam are feeling the effects of the low price of tin. In the Federated Malay States owners are also finding it hard to work their mines, but the wages of the coolies are not as high as in Siam, where remuneration has always been at least 30 per cent higher. The position has been made still more difficult by the high value of the tical. Prior to the war mining coolies in the Federated Malay States received from 70 cents to $1.20 a day and in Pukit (Siam) from 1.20 ticals to 2.50 ticals a day. At par rate of exchange 1.20 ticals and 2.50 ticals are equivalent to 80 cents and $1.66 respectively. They are now equivalent to $1.08 and $2.25 respectively. The price of market produce has not fallen proportionately to the rise in exchange, and the owner of the mines who makes most of his purchases in the local market and sells his output in Straits Settlements currency in Penang suffers from the high rate of exchange, and as a result has to reduce wages to such a point that the coolies leave, or he works only the richest portion of his mines, or closes down temporarily in the hope that the price of tin will recover and exchange revert to par.

SARAWAK

Kuching, the capital of Sarawak, is shortly to have electric light. The plant will comprise two Belliss and Morcom steam engines direct-coupled to continuous current 250-kw. Crompton generators, while the switchboard, balancer for the 3-wire system and station auxiliary motors, will also be of the latter manufacture. The supply will be on the 3-wire system, 460 volts for motors, 230 volts for lighting and fans. Babcock and Wilcox boilers with automatic stokers are being installed, surface condensers by Bellis and Morcom, and the auxiliary pumps will be driven by Crompton motors.

TRADE IN NETHERLANDS EAST INDIES

The Overseas Committee of the Federation of British Industries is recommending its members to adopt a scheme whereby a given number of representa-

tive British manufacturers in non-competitive lines will form a limited company in Java. It would appear that the time has come when the Germans in the Netherlands East Indies are finding it increasingly difficult to undersell their competitors, while they are frequently discovering that it is impossible to carry out their contracts in the matter of deliveries. Not only in the matter of price has the position of the Germans weakened. It will be recalled that when the late Government of the Dutch East Indies was in power an agreement was reported to have been made with the Rhein Elbe Union which gave that concern a very large share—indeed, almost a monopoly—of public works contracts and supplies. So greatly was this arrangement in favour of the Germans that it provoked strong protests from Dutch firms at home, who felt that they were being deprived of opportunities of doing business in their own colonies. Circumstances subsequently arose which drew attention to the nature of the understanding with the Stinnes combine. The new Government caused inquiries to be made. As a result of those investigations drastic changes have since been made and there is every likelihood that the monopolistic arrangement with the Germans will be set aside. Now is the time when efforts to secure trade of all kinds should be made, and made quickly, before other countries have had time to secure all the benefits which will be reaped from inter-trading with these extremely rich islands.

PARLOUS STATE OF AUSTRALIAN FRUIT INDUSTRY

C. Hartlett, Office of the Trade Commissioner

Melbourne, January 15, 1923.—Australian fruit-growers are very perturbed at the present time owing to the difficulty they find in marketing their products both at home and abroad. It is claimed that inland rail and oversea marine freights are now so high that the grower cannot compete with the products of other countries in the British markets upon which they have hitherto mainly depended, and even the domestic demand is far from satisfactory owing to the high cost of the fruit to the consumer.

So far as the domestic markets for ordinary qualities of fruits are concerned, the grower complains that railroad and other charges leave him the bare cost of production at the most, while the consumer is strongly of the opinion that there is nothing to warrant the present high price which he is compelled to pay for the same fruit in retail shops, and consequently purchases as little as possible of a commodity produced in this country in great abundance and of splendid quality.

Many conferences of growers, officials and others interested in the industry have recently been held, but the solution of the problem of satisfying both the grower and the consumer has not yet been found. An advertising campaign by the Victorian Railway Department in the form of large placards posted on railroad depots and newspaper advertisements throughout the country advocating a larger consumption of fruit, has not relieved the situation to any extent, nor have attempts to bring about a direct connection between grower and consumer been more successful. "Over-production" is being freely discussed and restriction of output advocated. At many conferences between Government representatives and growers, it is being urged upon the Government to refrain from encouraging the planting of fruit trees as a commercial undertaking, seeing that the present returns from many fruits realize less than the cost of production.

MARKETS SOUGHT

The Commonwealth and States governments are making every effort to find new markets, particularly for the citrus and other fruits from the various

soldier and other irrigation settlements established in recent years on the banks of the river Murray. As an illustration, a commission of three experts is on the way to the United Kingdom and the Continent, at the joint expense of the Commonwealth and State governments, to investigate trading conditions there and to assist in marketing this season's pack of fresh, canned and dried fruits to the best advantage. The sum of £6,000 has been allocated for this purpose. It is probable that one or more of these experts will visit Canada on the return journey with the object of developing the market for raisins and currants in the Dominion.

Last year a trade in oranges was successfully initiated with Canada and New Zealand by the consignment of shipments which gave satisfactory returns to the growers, and next season those markets are to be further exploited on a larger scale in regard to both fresh and dried fruits. Every effort is also to be made to find profitable markets in China, Japan and the East generally through the medium of the Australian Trade Commissioners already established there.

GOVERNMENT ASSISTANCE

Although it is understood that the Commonwealth Government incurred a loss on the guaranteed price to the canned fruit pool of last season, a guarantee of 90 per cent of the value of processed fruit sent into the voluntary pool formed to handle this season's pack has also been given. The grading and packing is now proceeding under the strict supervision of an experienced and capable staff of government inspectors, and every effort is being made to raise the standard of the export pack to the highest possible level. It is the intention of the government to prevent any repetition of the adverse criticism to which much publicity was given in regard to the appearance and quality of the exported portion of last season's pack.

So far all efforts to obtain a reduction in freight rates to the United Kingdom have been unsuccessful mainly, it is stated, owing to the high cost of operating vessels in Australian waters. Efforts also to obtain additional preference in the duties on Australian dried and canned fruits entering the United Kingdom have likewise failed in their object.

PROGRESS OF THE AUSTRALIAN COTTON INDUSTRY

C. Hartlett, Office of the Trade Commissioner

Melbourne, January 15, 1923.—With the object of stimulating the production of cotton, the Government of the State of Victoria announces that it has agreed to co-operate with the Commonwealth Government in providing a guarantee to cotton-growers in this state, the irrigated sections of which have been proved to be suitable to the industry.

It is proposed to contribute with the Commonwealth, on a £1 for £1 basis, whatever may be the difference between the price realized for the cotton and the price guaranteed to the growers. Reasonable expenses in preparing the cotton and placing it on the market would be taken into consideration in ascertaining that difference, and the contribution is tentatively fixed for a limit of three years.

The Commonwealth Government guarantee, arrived at after consultation with the British cotton delegation representing British cotton-spinning organizations, which recently visited Australia to investigate sources of supply within the Empire, was fixed at 5½d. (11 cents) per pound for all seed cotton of approved quality and cotton of 1¼-inch staple and over for the year 1922-23, and 4½d. (9 cents) per pound for cotton of shorter staple for the season 1923-24,

the guarantee to be reduced to 4d. (8 cents) per pound for cotton of under 1¼ inch for the third season, 1924-25.

As indicated in previous reports from this office in the *Commercial Intelligence Journal,* marked progress is being made in the industry in Queensland, which is considered to be the most adapted of all the states for cotton-growing. Recent reports indicate that sufficient seed has been applied for from the Government to sow 140,000 acres in that state during this season, and it is estimated that the 1923 yield should be worth over £1,000,000. Over forty gins are in the course of erection, as well as a number of mills for the production of oil and other by-products.

AUSTRALIAN GOLD YIELD IN 1922

C. Hartlett, Office of the Trade Commissioner

Melbourne, January 15, 1923.—Official figures made available show that the gold production of Australia for the calendar year 1922 was 758,303 ounces fine as against 757,431 ounces fine in 1921.

The following is a comparison of the yields of the various states for the years, 1920, 1921, and 1922:—

	1920 Oz. Fine	1921 Oz. Fine	1922 Oz. Fine
Victoria	152,792	104,512	109,273
New South Wales	48,907	51,173	25,222
Queensland	114,181	38,418	79,332
West Australia	617,842	553,728	537,876
South Australia	4,000	3,600	2,800
Tasmania	6,170	6,000	3,800
Total	943,892	757,431	758,303

The extent to which the Australian gold yield has declined is shown by the fact that ten years ago it was 2,325,933 ounces, and in 1919 it was 1,068,102 ounces.

Owing to the gradual working out of old-established formations, the absence of new mines of prominence, and the high cost of labour and material, it is unlikely that the yield for 1922, although slightly better than that for 1921, will be maintained.

MARKET CONDITIONS IN THE BRITISH WEST INDIES

Trade Commissioner E. H. S. Flood.

Barbados

Barbados, February 7, 1923.—Cane reaping began on some of the estates during the month, and by the middle of February will be in full swing. The estimate for the sugar crop is 65,000 tons, which is high, the average for a good year being 50,000 tons. The price of sugar now stands at a point which yields a fair margin of profit, and some advance sales of new crop molasses have been made at 43 cents per gallon f.o.b. which also carries a margin.

The provision market has been dull during the month, stocks being in fair supply in nearly all foodstuffs. Flour appears to be overstocked, and super grades, due to this overstocking, are being offered at low prices to clear. Other grades, such as Bakers', are selling at normal prices. Good medium codfish is bringing, duty paid, $24 per cask. The supply at the time of writing is getting low, and unless further shipments are received very shortly, prices will advance. In the dry goods trade, stocks are sufficient to meet requirements.

The customs returns for January show that the imports for the month have increased over those of January, 1922, by nearly 50 per cent, notwithstanding an increase in the customs duties during the year.

Trinidad

Prices for cocoa declined a few points during December, and have not as yet made a recovery. The quantity shipped during 1922 was less than in any year since 1913. Demand for coconuts is reported as weak with prices low. The demand market for copra is improving, and somewhat better prices are being obtained. The quantity shipped to the end of 1922 was over 9,000,000 pounds, which was much in excess of any previous year. The shipments of oil for the year were 48,291,870 gallons, which also created a record.

The quantity of sugar reported in 1922 was greater than in any recent year, and perhaps in the history of the colony, amounting to 66,754 tons. Some interest is now being taken in this colony in sugar refining. At least two of the largest sugar plants have been engaged in the construction of modern equipment to be put into operation this year. This, however, is not the first effort in this direction made in Trinidad, as in 1920 some 1,400 tons of what was said to be excellent quality granulated sugar was manufactured. An intensive campaign among the retail trade to use locally refined sugar is being planned, and it is intended to supply this sugar to the trade put up in packages.

TRADE OF JAPAN, 1922

Trade Commissioner A. E. Bryan

Yokohama, January 15, 1923.—The total figures of the trade of this country for 1922 have just been issued and show that although an unfavourable balance was recorded to the extent of 252,344,000 yen, yet it was less by 108,611,000 yen than the excess of imports over exports in 1921. Both imports and exports show considerable increases over the previous year so that the total trade of the country mounted up to 3,526,864,000 yen as compared with 2,865,961,000 yen in the year 1921.

A summary of the year's trade as compared with 1921 may be given as follows:—

TOTAL TRADE OF JAPAN, 1921-1922

	1921	1922
Imports	Yen 1,613,458,000	Yen 1,889,604,000
Exports	1,252,503,000	1,637,260,000
Total	2,865,961,000	3,526,864,000
Import balance	360,955,000	252,344,000

IMPORT TRADE

Compared with the year 1921, increases were shown in the purchases of lumber (by about 100 per cent), rice, wool, woollen tissues, iron bars, rods, plates and sheets, beans and peas, paper, paper pulp, caustic soda, soda ash, lead ingots and slabs, wheat, bran, etc. In fact, there were increases registered in twenty-three out of thirty-eight articles mentioned in the annual returns. The following gives the comparison (under the principal headings only) of imports for 1921 and 1922:—

Imports into Japan During 1921 and 1922

	1922 1000 Yen	1921 1000 Yen	Inc. (X) or Dec. (—) 1000 Yen
Food, drink and tobacco	290,236	208,329	X 81,907
Raw materials	828,048	757,020	X 71,028
Manufactures for further use in manufacturing	390,572	324,058	X 66,514
Articles wholly manufactured	365,385	311,469	X 53,916
Miscellaneous	16,073	13,279	X 2,794
Total imports	1,890,314	1,614,155	X276,159
Total exports and imports	3,527,761	2,866,993	X660,768
Excess of imports	252,867	361,317	....

EXPORT TRADE

The increase in the export trade is largely due to raw silk which was purchased this year in tremendous quantities by the United States—American buyers taking 603,300,000 yen of raw silk alone out of a total of 671,365,000 yen or 90 per cent of the whole value exported by Japan. Notable increases are also shown in the sales of cotton yarns, silk tissues, cotton tissues, knitted goods, tea, rice, camphor and straw braid. On the other hand, Japan's sales of copper, cement, paper, beer and coal fell away to a large extent.

The following summarizes (under the principal headings) Japan's exports during 1922 as compared with 1921:—

Exports from Japan During 1921 and 1922

	1922 1000 Yen	1921 1000 Yen	Inc. (X) or Dec. (—) 1000 Yen
Food, drink and tobacco	104,396	79,682	X 24,714
Raw materials	84,736	79,409	X 5,327
Manufactures for further use in manufacturing	842,431	550,727	X291,704
Articles wholly manufactured	581,951	524,175	X 57,776
Miscellaneous	23,933	18,845	X 5,088
Total exports	1,637,447	1,252,838	X384,609

[A more detailed statement of the import and export trade of Japan is on file at the Department of Trade and Commerce, Ottawa, copies of which may be obtained by interested Canadian firms on application to the Director, Commercial Intelligence Service (quoting file No. T.C.-3-126).]

CANADA-JAPAN TRADE

The figures for the whole year just ended showing the part that each country has taken in Japan's trade will not be issued for a month or so yet, but it is known that Canada increased her sales during 1922 to a very large extent as compared with former years. In fact, it looks now as if this increase might be as high as 90 per cent over 1921, which was our best year to date.

On the other hand exports from Japan to Canada will be about the same in 1922 as they were in the previous twelve months—that is, in the neighbourhood of 10,000,000 yen or about two-thirds the value of their purchases from Canada.

A more complete report on Canadian-Japanese trade will be published in due course.

COMMERCIAL NOTES FROM CHINA

Trade Commissioner J. W. Ross

Business Conditions

Shanghai, January 20, 1923.—Generally speaking 1922 has been one of the worst years in the political and commercial history of China for a long period. It opened with a steady fall in the price of silver exchange which offered no hope for the liquidation of heavy stocks of piece-goods and other commodities in godowns carried by the banks, and thus limited the purchase of additional stocks which would require an increased amount of silver dollars to pay for them. In addition, the ever-growing political disturbances in certain parts of the country reached a climax, so that in the month of May a condition of civil war existed in three of the Northern provinces, not to speak of the Southern revolutionary movement which has been active for several years. These factors were of themselves sufficient to play havoc with business and to limit enterprise, but another factor also played a part in the general hard times, and this was a partial failure, for the third season in succession, of the wheat crop. This crop, which in the spring gave every promise of being fairly up to normal, was found upon reaping not to be more than 50 per cent of average. The consequence is that half the flour mills in Shanghai are closed down for want of wheat to grind, and large quantities of both wheat and flour have had to be imported to supply the demand. The condition of business in the foreign commercial community tells the same tale, and has seldom in any year been so bad. Manchester piece-goods experienced a particularly bad year, and heavy stocks of cotton cloth left over from the boom times are still on hand. The smaller and more recently established United States firms found conditions very difficult and a number of them were obliged to withdraw from the market; in fact, by far the greater number of the many United States firms which established themselves in China at the close of the war have one by one disappeared. This is partly due to the fact that many Chinese products which were previously exported to the United States have been shut out by the operations of the new tariff, and such business is now at a standstill. This applies to beans and bean oil, cotton seed and cotton seed oil, peanuts, egg and egg products and similar commodities.

China's Customs Returns, 1922

Notwithstanding the adverse conditions narrated in the preceding paragraph, the Chinese Maritime Customs revenue for the year showed an increase of Hk. tls. 4,100,000 over the record year of 1921. Total collections for 1922 were Hk. tls. 58,600,000—at a rate of 3s. 9d. to the tael, representing a sterling value of £10,897,500. On account of the lower exchange rate, this only represented an increase of £215,235 sterling over the figures of the previous year. All the large ports record an increase in Customs revenue which also represents an increase in trade. These increases are: Shanghai, Hk. tls. 1,720,000; Hankow, Hk. tls. 658,000; Tientsin, Hk. tls. 227,000; Swatow, Hk. tls. 8,000; Canton, Hk. tls. 147,000; and in the Manchurian ports: Dairen, Hk. tls. 586,000; Harbin, Hk. tls. 522,000; Antung, Hk. tls. 242,000.

Tariff Revision

The revised Chinese Maritime Customs Tariff recently adopted and agreed to by the Powers will come into force on January 17 of this year. The work of revising the Chinese Import Customs Tariff, which was commenced in April, 1922, came to an end on September 25. This is the second revision which has been made within the past four years. Under the latest revision, the valuation

of a large number of commodities has been increased in order that China may receive a full 5 per cent duty upon the present day value of imported goods. All goods shipped after January 17, 1923, must pay duty upon the new valuation. As a result of this new revision, it is estimated that China will receive an increased Customs revenue to the extent of about Hk. tls. 11,000,000, approximately $8,250,000 Canadian currency. This recent revision of values does not in any way affect the proposed surtax of an additional $2\frac{1}{2}$ per cent on China's present import duty of 5 per cent agreed to by the Washington Conference, contingent upon the abolition of the internal transit tax now in force, known as Liken.

United States Activity in China

The passage of the United States China Trade Act has aroused considerable interest in China. The object of the act is to give relief to United States firms and corporations trading or otherwise doing business in China, in the way of exempting such concerns from the imposition of taxes upon the income of the business in question. The provisions of the act apply to firms in China proper, in Thibet, Mongolia and Manchuria and any territory leased by China to any foreign Government, the British Crown Colony of Hong Hong, and the province of Macao. Without doubt United States firms have been seriously at a disadvantage in the past in respect to the payment of income tax upon their businesses when compared with the nationals of Great Britain, France and Japan, who have not been called upon by their respective governments to pay such taxes. This has no doubt hampered enterprise on the part of United States business men, and prevented the investment of capital in local industries and Chinese corporations.

As the result of the passage of the China Trade Act, a certain American well known in China has recently returned from the United States with the intention of making large investments in Chinese industrial enterprises, and founding others. These include spinning and weaving, and printing cotton cloth. the manufacture of silk fabrics on a large scale, and in addition a film enterprise representing an investment of several millions of dollars.

The Flour Market

The promise of a fair average crop of wheat which was held in the spring of last year was dispelled when the crop came to be gathered in. By August it was apparent that the wheat supply would be short, although the mills at Shanghai were engaged in exporting flour to South China ports in large quantity. In the latter month (August) 10,000 tons of American flour were imported, in profitable competition with the rising prices of China flour. This has been followed by further and increased importations every month to date. Up to the early autumn, Chinese flour-mill owners refrained from importing American wheat, hoping that the needed supplies from China could actually be obtained. In this they were disappointed, for it was soon evident that there was very little wheat in the country. On account of a brisk demand for wheat by the local mills at Harbin and difficulties of transportation, Manchurian wheat was not available, neither could Australian wheat be obtained at profitable prices. Consequently the only sources open were the United States and Canada. The former took full advantage of the situation, with the result that about 60,000 tons of wheat have been brought into China this year and very large quantities of flour. For certain reasons, only relatively small quantities of Canadian wheat have reached this market, although considerable consignments of Canadian flour have been imported both in Shanghai and Hong Kong. There are

two reasons why Canadian flour and wheat fail to obtain a large market in China. In respect to flour, China demands a low grade of which only a limited quantity is produced in Canada, and foreign dealers here will not make any attempt to induce their Chinese customers to purchase a higher grade, even at a very slight increase in cost, as long as a low-grade flour can be obtained from any source. In respect to wheat, this office has had great difficulty in obtaining firm quotations for this market, and feels the need of some central selling agency or grain board at Vancouver to whom it can apply for quotations. Cabling is expensive, and the replies to the different inquiries which have been sent have not in any case been such that business has resulted. On the other hand, the United States has been shipping wheat from Seattle and Portland to this market all the season.

First Elevator in China

It is reported from Dairen that the South Manchurian Railway propose to erect an elevator at that port during the coming year, at an estimated cost of yen 4,000,000 ($2,000,000 Canadian currency), and with a capacity of 100,000 tons. It will be used chiefly for the handling of beans, but wheat and other grains can be received and shipped. At present all grains, as well as beans, are received at Dairen in sacks. The establishment of an elevator will do away with this costly method of handling seeds, for everything can then be handled in bulk. This new enterprise may be the means of making Dairen the great grain market of the Far East, as it is for beans.

Business Activity in Shanghai

Returning to Shanghai after an absence of five months, the writer was impressed by the great activity of this port, which is shown the moment one enters the river, for not only is this activity apparent in the harbour, where numerous ocean-going ships from every part of the world are anchored, but in the multitude of native craft engaged in transporting commodities of every description in and out of the port. Shanghai itself is apparently busier than ever, and building operations are as great or even greater than in the most prosperous days of the port. Although business in the interior of the country is admittedly bad, this condition is not reflected in Shanghai—the day and night life appears to be marked by great ostentation and extravagance. Shanghai is without doubt rapidly becoming a great port, not only in regard to shipping, but as an industrial centre, whole districts being given over to manufacturing concerns of many descriptions. Competition in saleable commodities is also very keen, so much so that it would appear that all the exporting countries in the world are looking to China as a market for their products. Thus we find woollen and other textiles from Poland, glass and hardware from Belgium, enamelled-ware from Czecho-Slovakia, and numerous commodities from Germany, France, Italy, the United States, Japan, Australia, India, and elsewhere. The Canadian Government salesroom, which will be opened in about a fortnight, will demonstrate that Canada is also in this market to sell goods, and with the attractive lot of samples which will be shown, the success of the enterprise can be safely taken for granted.

EXHIBITIONS AND FAIRS

Motor Exhibition to be Held at Melbourne

C. Hartlett, Office of the Trade Commissioner

Melbourne, January 15, 1923.—Arrangements are being made for the holding at Melbourne of an exhibition of motor cars, commercial vehicles, motor cycles, accessories and all adjuncts of motoring. The date is fixed from July 5 to 14 next.

In addition to post-war models of the leading cars and motor cycles, special exhibits will also be displayed of the accessories and patent equipment which have been put on the market in recent years. There will also be a display of motoring clothing by leading manufacturers and importers.

It is ten years since the last motor exhibition was held in Melbourne, and it is therefore anticipated that the forthcoming show will not only be of great interest to importers and those engaged in the industry but to the general public as well.

Exhibition of Wheat, Agricultural Machinery, etc., at Buenos Aires

The Consul General of the Argentine Republic, Ottawa, writes under date February 13, 1923, that an exhibition of home-grown wheat will be held on the grounds of the Sociedad Rural Argentina, Buenos Aires, from May 5 to 13, 1923, inclusive. Specimens of seed wheat, threshing machines, milling machinery, bread-making machines, seeders and graders will also be exhibited. Literature relative to wheat-growing and its developments, as well as instructive pictures, etc., will also be shown. The Ministry of Agriculture, under whose auspices the exhibition is being held, desire that manufacturers of agricultural machinery and seed merchants in Canada should take the opportunity of participating. The exhibits will enter Argentina free of duty and show space will also be provided free. Canadian manufacturers and merchants who have not agents in Argentina may consign to the Department of Agriculture, Buenos Aires.

Full information regarding this exhibition may be obtained on application to the Consul General of the Argentine Republic, 459 MacLaren street, Ottawa.

Sixth International Exhibition of Rubber at Brussels

The Sixth International Exhibition of Rubber, Other Tropical Products and Allied Industries will be held in Brussels in April, 1924. This exhibition, which is to be held at the Hall du Cinquantenaire, is under the patronage of His Majesty the King of the Belgians.

Applications for space and all communications and inquiries should be addressed to H. Greville Montgomery, Organizing Director, or Miss Edith A. Browne, F.R.G.S., Overseas Delegate, Exhibition Offices, 43 Essex St., Strand, London, W.C. 2.

Prague International Fair

The Prague International Fair is to be held March 11 to 18, and again September 2 to 9, inclusive, of this year. The Prague Fair provides an unrivalled opportunity for meeting foreign buyers, and has the wholehearted support of all Czechoslovak commercial enterprises.

It should be noted that the Czechoslovak Republic represents three-quarters of the whole industry of the former Austro-Hungarian Monarchy and produces under normal conditions four times more than its population of 13,500,000 consumes.

Full information with respect to the fair may be obtained on application to the Czechoslovak Consulate, 209 Drummond Street, Montreal.

TARIFF CHANGES AND CUSTOMS REGULATIONS

Customs Duty on Condensed Milk in British Guiana

Referring to the report on the customs duty on condensed milk in British Guiana which was published in *Commercial Intelligence Journal* No. 992 (February 3, 1922, pages 189-90), Mr. E. H. S. Flood, Canadian Trade Commissioner in Barbados, writes under date February 7, 1923, that the customs duties ordinance recently passed on condensed milk is now under reconsideration, and it is proposed to change the expression 10 per cent wherever such expression occurs to 7 per cent. This will therefore admit certain brands of milk which, though of first-rate quality, may not have obtained the 10 per cent required by the former act.

United States Countervailing Duties: Logs from British Columbia

Mr. M. M. Mahoney, representative at Washington of the Department of External Affairs of Canada, has forwarded a copy of a notice sent under date of February 2 from the United States Treasury Department to collectors of customs instructing collectors to assess under paragraph 401 of the Tariff Act of 1922 on certain logs cut from Crown or private lands in the province of British Columbia that are subject to the payment of a certain timber tax. The notice is as follows:—

> The Secretary of State has caused to be forwarded to the Department a copy of the "Forest Act" of the province of British Columbia (consolidated for convenience only May 6, 1921), section 58, subsection 2, of which reads as follows:—
>
> "(*a*) There shall be due and payable to His Majesty, his heirs and successors, a tax upon all timber cut within the province, save and except that upon which a royalty is reserved by this section or any amendment thereof, or that upon which any royalty or tax is payable to the Government of the Dominion of Canada, which tax shall be as follows:—
>
> "Two dollars per thousand feet, board measure, on No. 1 grade; one dollar and fifty cents per thousand feet, board measure, on No. 2 grade; and one dollar per thousand feet, board measure, on No. 3 grade: Provided that a rebate of all the tax over and above one per cent per thousand feet, board measure, shall be allowed when the timber upon which it is due or payable is manufactured or used in the province. 1914, c. 32, s. 15."
>
> The Department is of the opinion that this provision of the statutes of the Province of British Columbia constitutes a restriction on exportation within the meaning of the proviso of paragraph 401 of the Tariff Act of 1922. Collectors are, therefore, hereby instructed to assess duty under that paragraph upon all logs of the varieties specified therein that are subject to the timber tax, provided for in the statute quoted herein, whether the logs are cut from Crown or private lands.
>
> Collectors shall require the production of such evidence as shall satisfy them whether logs from British Columbia are subject to the timber tax in question, and shall submit to the Department instructions any case in which they may be in doubt.
>
> (Sgd. Edward Clifford,
> *Assistant Secretary.*

For paragraph 401 of the United States tariff quoted above, see *Commercial Intelligence Journal* No. 992 (February 3, 1923).

Amendment to Montserrat Tariff Collection Ordinance, 1893

Trade Commissioner E. H. S. Flood

Barbados, February 1, 1923.—By Ordinance No. 16 of 1922—which went into effect on September 11 last—entitled the Tariff Collection Ordinance, 1893, Amendment Ordinance, 1922, the method of ascertaining and assessing the ad

valorem duties in Montserrat, as set out in section 14 of the principal ordinance, is repealed. The new ordinance only makes provision for the substitution of section 14 and deals *inter alia* with the method to be adopted when no invoice is produced.

Section 3 of the amending ordinance declares that no discounts or deductions from the value of any goods chargeable with ad valorem duty shall be allowed unless such discounts or deductions be clearly shown to the satisfaction of the Treasurer on the original invoice, or unless the same be verified by the signature of the manufacturer or person from whom the goods set forth in the invoice were purchased and by whom such discount or deduction has been actually allowed.

Sections 6 and 7 stipulate that for the purpose of assessing the amount of ad valorem duty payable on any goods, the price or value thereof shall be converted into Montserrat currency at the market rate of exchange on the day on which duty is paid, or on the date of the arrival of the importing ship, and that such exchange shall be determined either by the daily statement of rates of exchange appearing in the public telegrams, or in lieu thereof, the latest rates of exchange received by the banks carrying on business in the Presidency and so used by them as the market rates of exchange on the day on which the duty is assessed.

Representative of the New Zealand Customs Department in New York

Mr. Frederic Hudd, Canadian Trade Commissioner in the United States, advises that Mr. W. J. Stevenson, the newly-appointed official representative of the New Zealand Customs Department, has arrived in New York and established an office at 44 Whitehall street.

Official Customs representatives of the Governments of Canada, Australia, New Zealand, and South Africa are now located in New York and all have their offices in the same building.

OCEAN MAIL SERVICES

Mails for	Steamer	Sailing from	Date
Great Britain and countries via Great Britain.	†*President Harding*	New York	Mar. 3
" " "	–*Minnedosa*	St. John	" 3
" " "	†*Paris*	New York	" 7
" " "	*Montcalm*	St. John	" 9
" " "	†*George Washington*	New York	" 10
" " "	†*France*	"	" 14
" " "	†*Manchuria*	"	" 15
" " "	*Montrose*	St. John	" 16
France	**Antonia*	Halifax	" 9
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela.	*Caraquet*	"	" 2
Barbados, Trinidad, British Guiana	**Canadian Harvester*	"	" 10
China and Japan	*President McKinley*	Victoria	" 3
" " "	*Empress of Canada*	Vancouver	" 8
" " "	*Manila Maru*	Victoria	" 9
" " "	*President Jackson*	"	" 15
Australia and New Zealand	‡*Tahiti*	San Francisco	" 16
Australia only	‡*Ventura*	" "	" 27

Note.—The *Minnedosa* will be used for direct mail for the continent including direct Parcel Post to France.

† Letter mail only. * Parcel post and specially addressed correspondence only.
‡ Letter and Paper mail only. – Papers, Parcel post and specially addressed correspondence only.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING FEBRUARY 20, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement on the nominal closing quotations for all the principal exchanges for the week ending February 20, 1923. Those for the week ending February 13 are also given for the sake of comparison.

		Parity	Week ending Feb. 13, 1923	Week ending Feb. 20, 1923
Britain .. .. £	1.00	$4.86	$4.7337	$4.7846
France .. ..Fr.	1.	.193	.0619	.0619
Italy .. ..Lire	1.	.193	.0486	.0491
Holland .. ..Florin	1.	.402	.3998	.4030
Belgium .. ..Fr.	1.	.193	.0548	.0547
Spain .. ..Pes.	1.	.193	.1586	.1595
Portugal .. ..Esc.	1.	1.08	.0455	.0456
Switzerland.. .. .. Fr.	1.	.193	.1900	.1919
Germany .. .. Mk.	1.	.238	.000038	.000044
Greece .. .. Dr.	1.	.193	.0126	.0119
Norway .. .. Kr.	1.	.268	.1895	.1887
Sweden .. ..Kr.	1.	.268	.2687	.2704
Denmark .. .. Kr.	1.	.268	.1915	.1960
Japan .. ..Yen	1.	.498	.4903	.4907
India .. .. R.	1.	2s.	.3298	.3220
United States .. ..$	1.	$1.00	1.0100	1.0153
Mexico .. ..$	1.	.498	.4978	.5002
Argentina .. ..Pes.	1.	.424	.3753	.3778
Brazil .. .. Mil.	1.	.324	.1162	.1164
Roumania .. .. Lei	1.	.198	....	....
Jamaica .. ..£	1.	4.86	4.7501	4.7815
British Guiana .. ..$	1.	1.		
Barbados .. ..$	1.	1.		
Trinidad .. ..$	1.	1.		
Dominica.. .. ..$	1.	1.		
Grenada .. ..$	1.	1.	.9812-.9837	.9883-.9909
St. Kitts .. ..$	1.	1.		
St. Lucia.. .. ..$	1.	1.		
St. Vincent .. ..$	1.	1.		
Tobago .. ..$	1.	1.		
Shanghai, China .. ..Tael	1.	.708	.7392	.7328
Batavia, Java .. .. Guilder	1.	.402	.3879	.3943
Singapore, Straits Settlements .. $	1.	.567	.5585	.5604

TENDERS INVITED

New Zealand

Copies of specifications have been received from Mr. W. A. Beddoe, Canadian Trade Commissioner, Auckland, for equipment for the Public Works Tenders Board, Wellington. These specifications are open for inspection at the Commercial Intelligence Branch, Department of Trade and Commerce, Ottawa. Tenders should be addressed to the Secretary, Public Works Supplies and Tenders Committee, Wellington, in accordance with these specifications.

No.	Date of Closing	Particulars
S.M. 157.	May 1, 1923.	Mangahao Power Scheme, Section 70: Two oil filters complete with oven, etc., as specified; capacity 25-40 galls. per min. One portable oil filter complete with oven, etc., as specified; capacity 7-12 galls. per min. Two oil-testing transformers complete, as specified; 230/30,000 volts. One portable oil-testing transformer complete, as specified; 230/25,000 volts. 20,000 sheets filter paper for the large filter. 10,000 sheets filter paper for the small filter.
S.M. 158.	May 29, 1923.	Mangahao Power Scheme, Section 74: Two petrol engines and generators and accessories. Six single-phase transformers, in accordance with specification.

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1297. Grain.—An old established Hamburg firm of grain importers are open to form a connection with a Canadian exporting firm.

1298. Grain.—A large Hamburg firm of grain importers without any present connections in Canada are willing to form connections with a leading Canadian firm of grain exporters.

1299. Maize.—The Hamburg representatives of a German association of agricultural societies are anxious to form a connection with any Canadian firm in a position to offer maize for shipment to Germany.

1354. Oilmeal.—A firm of commission agents in Barbados desire to obtain a Canadian connection for oilmeal. Prices must be competitive, when a large business can be done. Good references can be supplied.

1355. Beeswax and Cereals.—A commission agent of Antwerp desires to get into touch with Canadian firms exporting beeswax and cereals of all kinds.

1356. Canadian Cheese.—An importer in Osaka has inquiries from some of his clients for Canadian cheese put up in tins of one pound and smaller, and desires to hear from firms in a position to supply.

1300. Maple Syrup.—A large foreign wholesaler located in Yokohama desires to receive a sample and prices of Canadian pure maple syrup put up in suitable containers of one pound and larger for household use.

1301. Wheat.—An old-established house in Tokyo desires to hear from Canadian exporters of wheat with a view to representing some good reliable Canadian firm in Japan.

Miscellaneous

1302. Carbon Black.—A British firm in Shanghai would like to receive prices, methods of shipment, packing, etc., for carbon black.

1303. Three-ply Tea and Rubber Chests and Box Shooks.—A Colombo merchant wishes to get into touch with Canadian manufacturers of 3-ply for tea and rubber chests. Specifications and prices should be given in original letter.

1304. Dowels, Clothes Pegs and Woodenware.—A firm of manufacturers' agents in London wish to secure the United Kingdom agency of Canadian manufacturers of dowels, clothes pegs and similar goods.

1305. Food Products; Electrical Material, Iron, etc.—A firm in Rio de Janeiro desire to get in touch with Canadian manufacturers of: malt, fresh fruits (cold storage), preserved fruit in tins, preserved fish, flour; rosin; caustic soda, soda ash, bichromate of potash, Glauber salts, Epsom salts; barbwire, tinplate nail wire, corrugated and smooth; galvanized iron sheets, black iron sheets; electrical material.

1306. Aluminum Household Utensils.—A Japanese commission house would be glad to have catalogues and prices of Canadian manufacturers of aluminium household utensils.

1307. Household Tools.—A Japanese import house in Osaka is interested in any kind of handy tools for household use and would be glad to hear from any manufacturer interested.

1308. Surgeons' and Household Rubber Gloves.—A foreign import house located in Tokyo would be glad to receive samples and prices from Canadian manufacturers of surgeons' and household gloves.

1309. Hot-water Bottles.—A large foreign drug concern, with branches in various cities of Japan, would be glad to receive samples and prices of Canadian-made seamless rubber hot-water bottles.

1310. Fishing Hooks.—A Japanese firm desire to receive samples and prices of Canadian fishing hooks.

1311. Asbestos.—A Japanese concern largely experienced in the sale of asbestos would be glad to hear from Canadian asbestos mines, with samples and prices both of crude and fibre of varius grades.

1312. Crude Asbestos.—A Japanese importer in Osaka desires to receive samples of crude asbestos, in uncarded, carded and ground form. Prices and full particulars are requested.

1313. Asbestos Yarn.—A Canadian manufacturer of asbestos would do well to send samples of their product to a Japanese importer who is particularly interested in asbestos yarn $\frac{1}{32}$ inch and $\frac{1}{64}$ inch in thickness.

1314. Asbestos Millboard.—A firm in Osaka desire to receive weights, samples and prices of Canadian asbestos millboard. Specifications are as follows: 40 inches by 40 inches square, $\frac{1}{16}$ inch, $\frac{1}{8}$ inch and $\frac{1}{4}$ inch in thickness.

1315. Bristol Boards.—A commission house in Kobe desires to hear from Canadian mills in a position to export Bristol boards to Japan. Samples and prices are requested immediately.

1316. Newsprint.—A Japanese import and export house is anxious to receive samples of Canadian newsprint. Can sell large quantities in Japan if prices are competitive. Weights do not matter so much if mills can cut rolls 43-inch wide and approximately 16,000 feet long.

1317. Newsprint.—A firm in Kobe, specializing in the import of paper of all kinds, desire to receive samples and prices of Canadian newsprint with information as to what quantity could be supplied monthly. Size required: 43 inches wide in rolls of about 16,000 feet.

1318. Kraft Wrapping Paper.—A firm in Tokyo doing business in paper for many years past desires to receive samples and prices of Canadian wrapping papers with a view to representing such a mill in Japan. Tonnage available and other particulars of interest to such an importer should be fully supplied. This firm is one of the largest importers of paper in Japan and would make a good representative for a Canadian mill.

1319. Packing Paper.—A Japanese import house is very anxious to receive samples and prices of packing and wrapping papers.

1320. Writing Papers and Bonds.—Canadian mills manufacturing writing papers of medium quality should send samples and prices to a firm in Japan specializing in the import of this product.

1321. Sulphite Papers.—A well-established Japanese paper house desires to import sulphite paper from Canada, and would like to receive samples, prices, terms, etc.

1322. Kerosene Oil Stoves.—A Japanese commission house desires to receive catalogues and prices of kerosene oil stoves of all kinds, both cooking and heating.

1323. Ice Cream Freezers.—An import firm located in Tokyo, interested largely in the sale of household and cooking utensils of various kinds, would be glad to receive catalogues and prices of Canadian ice cream freezers.

1324. Wood-pulp and Metals.—A firm in Milan desires to import wood-pulp and metals from Canada.

1325. Wood-pulp.—A Milan firm would like to hear from Canadian exporters of wood-pulp.

1326. Wood-pulp.—A firm in Venice is anxious to receive offers from Canadian exporters of wood-pulp.

1327. Wood-pulp.—A firm in Italy wishes to receive communications from Canadian exporters of wood-pulp.

1328. Wood-pulp and Paper Mill Machinery.—A Genoa firm is desirous of securing the representation for Italy of a Canadian manufacturer of paper mill machinery and of wood-pulp.

1329. Lumber for Construction Purposes.—An Italian firm would be glad to consider offers from Canadian exporters of lumber.

1330. Lumber for Construction Purposes.—A concern in Milan carrying on business in lumber would be glad to do business with Canada.

1331. Lumber, Pitch Pine and Hardwoods.—An Italian concern desires to import from Canada.

1332. Lumber and China-clay are requested by an Italian firm wishing to open up business with Canada.

1333. Lumber.—A Genoa firm would be willing to represent Canadian exporters of lumber for construction purposes.

1334. Lumber and Metal Plates are requested by a Turin firm anxious to deal with Canadian exporters.

1335. Lumber.—A Milan firm desires to import lumber from Canada.

1336. Lumber.—An important firm in Milan dealing in lumber is anxious to get in touch with Canadian firms willing to open up business connections with Italy.

1337. Lumber for Construction Purposes.—A firm in Catania, Sicily, wishes to import lumber for construction purposes from Canada.

1338. Lumber.—A firm in Italy inquires for Canadian lumber for furniture making.

1339. Pitch Pine and Hard Woods are requested by a firm in Naples.

1340. Pitch Pine and Hard Woods.—A firm in Florence is anxious to get in touch with Canadian firms.

1341. Bicycle Accessories.—An important firm in Milan wishes to be put in touch with Canadian manufacturers of bicycle accessories.

1342. Automobile and Bicycle Accessories, Steel Tubes and Cast-iron Tubes.—A Milan firm is willing to hear from Canadian houses.

1343. Automobile and Bicycle Accessories.—A firm in Milan desires communications from Canadian exporters.

1344. Automobile, Motor Cycle and Bicycle Accessories are requested by a reliable firm in Milan.

1345. Automobile Accessories.—A firm in Palermo is anxious to hear from Canadian exporters of automobile accessories.

1346. Automobile and Motor Cycle Accessories and Spare Parts.—A firm in Milan wishes to import the above articles from Canada.

1347. Automobile, Motor Cycle and Bicycle Accessories.—A Turin firm would like to purchase the foregoing from Canada.

1348. Motor Cycles, Bicycles and Accessories.—A Florence firm is anxious to be put in touch with Candian houses.

1349. Agricultural Machinery.—A concern in Milan would like to receive offers from Canadian shippers of agricultural machinery.

1350. Agricultural Machinery.—A Milan company would be glad to consider offers from Canadian houses dealing in agricultural machinery.

1351. Agricultural Machinery, Sanitary Apparatus, Electrical Machinery and Apparatus, and Lubricating Oils are requested by an Italian company.

1352. Dairy Machinery.—An old-established firm in Milan would like to import dairy machinery from Canada.

1353. Boots and Shoes.—A firm in Genoa wishes to import boots and shoes from Canada.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From Halifax

To Liverpool and Queenstown.—Ausonia, Cunard-Anchor-Donaldson Line, Feb. 26; Andania, Cunard-Anchor-Donaldson Line, March 19; Megantic, White Star-Dominion Line, March 23.

To Glasgow and Londonderry.—Saturnia, Cunard-Anchor-Donaldson Line, Feb. 25.

To Plymouth, Cherbourg, and London.—Antonia, Cunard-Anchor-Donaldson Line, March 9.

To Bermuda, British West Indies, and British Guiana.—Royal Mail Steam Packet Co., March 2, and every fortnight thereafter.

To Barbados, Trinidad and Demerara (British Guiana).—Canadian Harvester, Canadian Government Merchant Marine, Ltd., March 10.

To Santiago (Cuba), Kingston, Montego Bay and St. Ann's Bay (Jamaica).—Andalusia, Pickford & Black, Feb. 28.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—Canadian Fisher, Canadian Government Merchant Marine, Ltd., March 1.

To Australia and New Zealand.—Canadian Explorer, Canadian Government Merchant Marine, Ltd., March 20.

From North Sydney

To St. John's (Nfld.).—Kyle, Reid-Newfoundland Co., Tuesday, Thursday and Saturday every week; Sable I., Farquhar Steamship Co., every Saturday.

From St. John

To London.—Sicilian, Canadian Pacific Steamships, Ltd., March 3; Hoerda, I.C. Transports, Ltd., March 5; Canadian Conqueror, Canadian Government Merchant Marine, Ltd., March 7; Bolingbroke, Canadian Pacific Steamships, Ltd., March 14; Lord Dufferin, I.C. Transports, Ltd., March 20.

To London (via Halifax).—Ariano, Furness Line, Feb. 25; Comino, Furness Line, March 20.

To Manchester (via Halifax).—Manchester Corporation, Manchester Line, March 3; Manchester Division, Manchester Line, March 17.

To Liverpool.—Canadian Miller, Canadian Government Merchant Marine, Ltd., Feb. 28; Metagama, Canadian Pacific Steamships, Ltd., March 1; Montcalm, Canadian Pacific Steamships, Ltd., March 9; Montrose, Canadian Pacific Steamships, Ltd., March 16; Montclare, Canadian Pacific Steamships, Ltd., March 23.

To Glasgow.—Cabotia, Cunard-Anchor-Donaldson Line, Feb. 28; Marburn, Canadian Pacific Steamships, Ltd., March 17.

To Cardiff and Swansea.—Canadian Squatter, Canadian Government Merchant Marine, Ltd., Feb. 28.

To Hull (via Halifax).—Ariano, Furness Line, Feb. 25; Comino, Furness Line, March 20.

To Southampton.—Minnedosa, Canadian Pacific Steamships, Ltd., March 3; Melita, Canadian Pacific Steamships, Ltd., March 17.

To Belfast, Londonderry and Cork.—Melmore Head, Head Line, March 4; Ramore Head, Head Line, March 15.

To Dublin, Londonderry and Cork.—Melmore Head, Head Line, March 4; Lord Antrim, Head Line, March 11.

To Avonmouth.—Cabotia, Cunard-Anchor-Donaldson Line, Feb. 28.

To Antwerp.—Minnedosa, Canadian Pacific Steamships, Ltd., March 3; Melita, Canadian Pacific Steamships, Ltd., March 17; Dunbridge, Canadian Pacific Steamships, Ltd., March 22.

To Rotterdam.—Hoerda, I.C. Transports, Ltd., March 5; Rathlin Head, Head Line, March 18; Lord Dufferin, I.C. Transports, Ltd., March 20.

To Bermuda, Barbados, Trinidad and Demerara.—Mattawa, Canadian Pacific Steamships, Ltd., March 20.

To Hamburg.—Melita, Canadian Pacific Steamships, Ltd., March 17; Rathlin Head, Head Line, March 18.

To Havre and Hamburg.—Hastings County, I.C. Transports, Ltd., Feb. 25; Essex County, I.C. Transports, Ltd., March 11; Welland County, I.C. Transports, Ltd., March 24.

To Bordeaux and Dunkirk.—Grey County, I.C. Transports, Ltd., March 20.

To Australia and New Zealand.—Erroll, New Zealand Shipping Co., Ltd., Feb. 26: Tredinnick, New Zealand Shipping Co., Ltd., March 21.

To South Africa.—New Mexico, Elder, Dempster & Co., Feb. 25.

To Rio de Janeiro, Santos, Montevideo and Buenos Aires.—Harmodius, Houston Line, March 15.

From Vancouver

To Yokohama, Kobe, Moji, Shanghai, Manila and Hong Kong.—Manila Maru, Osaka Shosen Kaisha, Feb. 27.

To Yokohama, Kobe, Nagasaki, Shanghai, Manila and Hong Kong.—Empress of Russia, Canadian Pacific Steamships, Ltd., March 22.

To Yokohama, Kobe, Shanghai and Hong Kong.---Empress of Canada, Canadian Pacific Steamships, Ltd., March 8.

To Yokohama and Kobe.—Toyooka Maru, Nippon Yusen Kaisha, March 18.

To Yokohama, Kobe, Hong Kong and Manila.—Protesilaus, Blue Funnel Line, March 10.

To Taku Bar, Shanghai, Singapore.—Grace Dollar, Dollar Line, Feb. 25.

To Australian Ports.—Canadian Importer, Canadian Government Merchant Marine, Ltd., March 6.

To Dairen (Manchuria).—Manila Maru, Osaka Shosen Kaisha, Feb. 29; Africa Maru, Osaka Shosen Kaisha, March 20.

To New Zealand and Australia.—Wairuna, Canadian-Australasian Royal Mail Line, March 15.

To the Orient.—Canadian Highlander, Canadian Government Merchant Marine, Ltd., March 15.

To Yokohama, Kobe, Moji, Shanghai and Hong Kong.—Africa Maru, Osaka Shosen Kaisha, March 20.

To London, Hull, Hamburg and Copenhagen.—Siam, East Asiatic Co., Inc., late February.

To Manchester.—Craster Hall, Isthmian Line, March 14.

From Victoria

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Yokohama Maru, Nippon Yusen Kaisha, Feb. 28.

To Yokohama, Kobe, Shanghai, Manila and Hong Kong.—President McKinley Admiral Oriental Line, March 3; President Jackson, Admiral Oriental Line, March 15.

To Yokohama and Kobe.—Kaga Maru, Nippon Yusen Kaisha, March 22.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 285 Beaver Hall Hill, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic.

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address, Canadian.*

Australia.

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium.

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil.

Major E. L. McColl. Address for letters—Caixa (P.O. Box) 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies.

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China.

J. W. Ross, Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba.

Address: 400 and 401 Teniente Rey 11, Havana. (Post-office Box 1290.) *Cable Address, Cantracom.*

France.

Lieut-Col. Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany.

L. D. Wilgress, Care British Consulate-General, Hamburg. (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland.

Norman D. Johnston, Zuidblaak 26, Rotterdam. *Cable Address, Watermill.*

India and Ceylon.

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy.

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica.

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan.

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico.

C. Noel Wilde. Address for letters, Apartado Num. 126 bis, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian.*

New Zealand.

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa.

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements.

P. W. Ward, P.O. Box 121, Singapore. (Territory covers Straits Settlements, British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

A. B. Muddiman, Sun Building, Clare Street, Bristol. *Cable Address, Canadian.*

Major Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States.

Frederic Hudd, 44 Whitehall Street, New York City. *Cable Address, Cantracom.*

CANADIAN COMMERCIAL AGENTS

Australia.

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark.

C. E. Sontum, Grubbegd, No. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies.

R. H. Curry, Nassau, Bahamas.

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

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DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

Printed by F. A. ACLAND, Printer to the King's Most Excellent Majesty

TABLE OF CONTENTS

Commercial Intelligence Journal

Issued Every Saturday by the Department of Trade and Commerce

Ottawa **March 3, 1923** **No. 996**

CANADIAN FIRMS INATTENTIVE TO CORRESPONDENCE

A constant source of complaint, not only from Canadian Trade Commissioners but from other sources as well, is the laxity shown by a number of Canadian firms in replying to foreign correspondence. Not infrequently foreign importers obtain the names of Canadian manufacturers of certain products imported by them, and write for quotations with a view, if such be favourable, to forming connections. It sometimes happens that the manufacturers addressed are not in export trade or interested in it, but instead of replying to that effect, they simply ignore the communication. The consequence of such treatment is that foreign importers become resentful, and the impression is formed in their minds that Canadian manufacturers are neither businesslike nor courteous.

While instances of inattention, carelessness or discourtesy may be isolated, nevertheless cumulatively they have an extremely ill effect, and this cannot but react upon Canadian trade in general. A letter has been received from Mr. Frederic Hudd, Canadian Trade Commissioner, New York, bearing on this subject, from which the following excerpt is taken:—

> "I would again bring to your attention the discouragement which we continue to meet as a result of the failure of Canadian firms to reply to communications from New York firms referred to them by this office. It is quite possible, of course, that in some cases the Canadian firms communicated with are either not interested or not in a position to handle the business. This is no reason, however, why communications should not be acknowledged, as a courteous acknowledgment or prompt attention tends to build up that basis of confidence and goodwill which is so essential to the successful development of export business, more particularly in view of the fact that some exporters are always looking for permanent sources of supply. I have endeavoured from time to time to bring the matter home to Canadian firms, but I have noted very little improvement."

Even if Canadian manufacturers are not interested in inquiries from abroad, it is very little trouble to courteously acknowledge each letter promptly upon receipt, and it is submitted that this is a duty which is incumbent upon them, if not in their own, at least in the larger interest of Canadian trade.

TRADE COMMISSIONER G. R. STEVENS' VISIT TO THE BAHAMAS

Mr. G. R. Stevens, Canadian Trade Commissioner in Kingston, Jamaica, is at present in the Bahamas, and will be there until March 15. Canadian firms who desire to make inquiries respecting business possibilities in their respective lines in these islands are requested to communicate immediately with Mr. Stevens, care of the Colonial Secretary, Bahamas, British West Indies.

TRADE COMMISSIONER W. J. EGAN'S ITINERARY IN CANADA

The itinerary arranged for Mr. W. J. Egan, Canadian Trade Commissioner, South Africa, for his business tour throughout the Dominion, as formerly announced in the *Commercial Intelligence Journal*, was interrupted by his participation in the Extension Courses in Export Trade held at the University of Toronto, McGill University, and l'Ecole des Hautes Etudes Commerciales, Montreal. The re-arranged itinerary is as follows:—

Guelph	March 9 and 10
Kitchener and Waterloo	" 12 and 13
Galt	" 14 and 15
Chatham	" 16 and 17
Windsor	" 19, 20 and 21
London	" 22 and 23
Stratford	" 24 and 26
Owen Sound	" 28
Toronto	" 30 to April 4
Winnipeg	April 7, 9 and 10
Brandon	" 11
Vancouver	" 15 to 21
Pembroke	" 25 and 26
Renfrew	" 28
Ottawa	" 30 to May 2
Smith's Falls	May 3
Brockville	" 4 and 5
Montreal	" 6 to 10
Three Rivers	" 11

The dates of his tour in the Maritime Provinces, and of his visit to Quebec City, will be later announced.

Firms in the cities and towns included in the above table who desire to be brought in touch with Mr. Egan or to interview him should address their communications to the Secretary of the local Chamber of Commerce or Board of Trade.

SUMMARY OF THE TRADE OF CANADA FOR JANUARY, 1923

The summary of the trade of Canada for January, 1923, shows that, as represented in dollars, imports for consumption were valued at $68,085,845 in January, 1923, as against $51,476,253 in January, 1922, and $72,252,223 in January, 1921. The imports from the United Kingdom in January, 1923, were valued at $10,707,129, as against $9,769,672 in January, 1922, and $11,215,762 in January, 1921. The imports from the United States in January, 1923, were valued at $49,142,939, as against $33,598,444 in January, 1922, and $51,823,917 in January, 1921. The total imports for the twelve months ending January, 1923, were valued at $778,948,901, as against $778,702,513 for the corresponding period in 1921-22, and $1,305,593,895 for the twelve months ending January, 1921.

The value of the exports of Canadian produce for the month of January, 1923, was $64,658,942, as against $46,198,080 for January, 1922, and $80,912,816 for January, 1921. The exports to the United Kingdom were valued at $21,722,492 in January, 1923, as compared with $16,933,905 in January, 1922, and $28,886,656 in January, 1921. The exports to the United States were valued at $30,270,860 during January, 1923, as against $21,134,715 in January, 1922, and $32,490,302 in the corresponding month of 1921. The value of the total exports of Canadian produce during the twelve months ending January, 1923, was $902,823,445, as against $767,985,084 for the corresponding period in 1921-22, and $1,235,621,584 for the twelve months ending January, 1921. The month's returns show an unfavourable balance of trade of $3,426,903; the returns for the twelve months' period show a favourable balance of $123,874,544.

SUMMARY OF THE TRADE OF CANADA: MONTH, TEN MONTHS AND TWELVE MONTHS ENDING JANUARY, 1923

(Compiled by External Trade Branch, Dominion Bureau of Statistics)

Main Groups	Month of January, 1923			Ten Months ending January, 1923			Twelve Months ending January, 1923		
	Total Imports	From United Kingdom	From United States	Total Imports	From United Kingdom	From United States	Total Imports	From United Kingdom	From United States
Imports for Consumption	$	$	$	$	$	$	$	$	$
Agricultural and Vegetable Products	11,204,029	1,807,519	5,852,385	131,719,558	22,445,662	59,217,106	159,114,484	26,685,543	75,281,311
Animal Products	4,627,812	249,829	3,423,280	37,502,665	2,424,863	28,035,790	47,780,051	3,331,695	35,613,532
Fibres and Textile Products	16,515,272	6,098,766	8,395,684	133,164,763	53,798,504	61,012,462	164,405,863	66,903,508	74,489,457
Wood, Wood Products and Paper	2,768,476	147,732	2,561,481	29,445,596	2,312,560	26,090,169	35,354,789	2,773,643	31,258,305
Iron and its Products	10,686,880	760,925	9,601,871	110,953,409	10,435,720	99,101,488	130,796,024	12,310,200	116,825,675
Non-Ferrous Metal Products	3,278,125	266,874	2,885,430	30,489,812	2,869,329	25,911,273	36,307,633	3,286,869	31,077,025
Non-Metallic Mineral Products	13,976,635	709,884	12,557,777	111,599,571	10,817,543	89,598,663	133,152,740	11,693,522	107,738,345
Chemicals and Allied Products	1,777,553	204,857	1,366,119	21,178,175	3,095,470	14,894,069	25,714,489	3,722,700	18,264,086
All other Commodities	3,251,063	460,743	2,498,912	39,222,371	6,008,535	29,555,854	46,322,728	7,090,833	34,823,834
Total Imports, 1923	68,085,845	10,707,129	49,142,939	645,275,920	114,208,186	433,416,874	778,948,901	137,798,513	525,371,570
1922	51,476,253	9,769,672	33,598,444	614,131,351	93,545,016	424,003,500	778,702,513	121,703,686	536,865,528
1921	72,252,223	11,215,762	51,823,917	1,075,587,720	185,814,892	743,314,792	1,305,593,895	226,257,290	898,573,311
	Total Exports	To United Kingdom	To United States	Total Exports	To United Kingdom	To United States	Total Exports	To United Kingdom	To United States
Exports (Canadian Produce).	$	$	$	$	$	$	$	$	$
Agricultural and Vegetable Products	22,229,282	15,093,419	1,459,022	366,277,244	247,662,533	38,263,618	403,637,195	271,001,297	41,437,458
Animal Products	9,289,341	3,739,610	4,351,805	118,448,877	57,963,573	46,983,871	135,265,218	65,453,534	54,294,512
Fibres and Textile Products	619,213	77,578	365,288	6,523,438	925,398	3,602,702	7,290,610	1,087,746	3,877,043
Wood, Wood Products and Paper	18,365,388	895,915	16,237,889	187,190,812	18,380,157	154,415,725	218,129,477	19,766,157	180,517,002
Iron and its Products	5,023,524	1,227,355	1,011,113	38,653,908	8,817,405	7,024,033	44,924,753	10,163,979	7,921,581
Non-Ferrous Metal Products	4,526,957	316,232	3,562,441	35,334,220	7,019,417	21,714,998	41,628,999	8,010,099	25,120,949
Non-Metallic Mineral Products	2,490,109	35,458	2,012,114	21,920,936	499,134	16,200,601	25,316,430	631,588	18,604,572
Chemicals and Allied Products	1,198,434	155,059	625,903	10,967,308	1,501,967	6,274,597	12,947,399	1,727,723	7,411,935
All other Commodities	916,694	181,866	645,285	11,920,940	1,510,449	8,951,950	13,683,364	1,698,358	10,107,340
Total Exports, 1923	64,658,942	21,722,492	30,270,860	797,237,683	344,280,033	303,432,095	902,823,445	379,540,481	349,292,392
1922	46,198,080	16,933,905	21,134,715	634,654,918	264,101,227	246,728,346	767,985,084	296,914,097	314,295,795
1921	80,912,816	28,886,656	32,490,302	1,055,833,535	280,032,001	474,755,518	1,235,621,584	332,063,347	551,543,278
Exports (Foreign Produce).									
Totals, 1923	975,708	39,375	686,235	11,625,167	632,499	9,603,544	13,891,372	819,973	11,351,824
1922	899,604	94,896	749,463	11,420,124	814,044	9,767,254	13,873,023	954,740	11,805,424
1921	1,021,042	115,835	815,476	18,811,519	1,243,104	16,340,799	27,599,817	1,867,918	24,233,238

STEADY DEMAND FOR DOWELS IN ENGLAND

Trade Commissioner Harrison Watson

London, February 9, 1923.—It will be known to readers of the *Commercial Intelligence Journal* that manufactures of wood of various kinds figure largely in the applications which are made to the United Kingdom Trade Commissioners by British firms.

An article about which this office is constantly approached is the so-called "dowel" or "dowel stick" which, while suitable for a number of purposes, is chiefly used by manufacturers of furniture, an important industry in the British Isles. Other uses are in connection with flooring and umbrella sticks.

Negotiations between British buyers and Canadian manufacturers have dragged on for a number of years, but while occasional shipments have been made, the quantities involved have not been large, because Canadian manufacturers have found difficulty in competing with prices at which dowels can be laid down in the United Kingdom from other sources, and moreover because prices obtainable were usually less attractive than in Canada itself.

Supplies have consequently been chiefly drawn from the United States and Scandinavia, where the woodworking industry is more systematically developed and organized than in the Dominion. In this connection it should be repeated that the trade in wooden goods generally is one of a comparatively small profit upon a large turnover, and can only be satisfactorily handled by the Canadian manufacturer who is advantageously located for securing cheap wood, power and transportation, and also has sufficient output capacity to turn out large quantities of a particular article, or size of that article, at the rock-bottom cost of production.

These advantages are also rendered necessary from the method of doing business in the United Kingdom, importations of handles, dowels, and all kinds of wooden goods being mainly conducted by merchant, brokerage, and commission firms, through whom users secure supplies in preference to purchasing direct from abroad. Such firms handle very large quantities and expect to buy at commensurate prices. Quotations for dowels fluctuate constantly, and moreover depend to some extent upon the qualities of the particular shipment. It is understood that the current prices being paid by importers for two of the leading sizes are as follows: $\frac{3}{8}$ inch by 36 inches, 42s. per 1,000 c.i.f. London; $\frac{1}{2}$ inch by 36 inches, 55s. 6d. per 1,000 c.i.f. London.

Although the upset caused by the war afforded Canadian manufacturers better opportunities, and it is known that several carloads of Canadian dowels have come over in recent years, full opportunity has not so far been taken of the opening existing, because, while complaints have been made about careless grading, the quality of Canadian birch dowels seems to be well regarded by the trade in this country.

As in the past few months there has been a recurrence of inquiries for Canadian sources of supply of dowels, this office has been making special inquiries with a view to locating manufacturers in a position to export, and in addition has systematically canvassed the requirements of London importers known to handle dowels. While a good many firms have been placed in touch with each other, a list of some of the principal London importers prepared to consider offers from Canada is being forwarded with this report, copies of which may be obtained by interested Canadian firms on application to the Director, Commercial Intelligence Service, Ottawa.

Resulting from the considerable variety of purposes for which dowels are used, a large number of different sizes are in demand, but the call is chiefly for a few standard dimensions, such as $\frac{3}{8}$ inch by 36 inches, $\frac{1}{2}$ by 36, $\frac{7}{16}$ by 30, and $\frac{3}{4}$ by 36, and requirements for these speedily run into carload lots.

Sizes notified to us by London importers include: $\frac{1}{4}$ inch by 36 inches; $\frac{5}{16}$ by 36, $\frac{3}{8}$ by 30, $\frac{3}{8}$ by 36, $\frac{7}{16}$ by 30, $\frac{1}{2}$ by 36, $\frac{5}{8}$ by 36, $\frac{3}{4}$ by 30, $\frac{3}{4}$ by 36, $\frac{7}{8}$ by 36, $\frac{7}{32}$ by 36. Longer sticks (mainly 42 inches and 48 inches) are sometimes needed. Birch is almost universally in demand.

As regards packing, dowels are usually shipped 200 in a bundle for the sizes up to $\frac{1}{2}$ inch, after which they are packed 100 in a bundle, tied round with strong string or wire, so that they will not come asunder in transit.

It is obviously necessary that the sizes notified in the specification should be scrupulously adhered to; otherwise, rejections will ensue with corresponding claims. It is also necessary that all dowels be round, and not with partially flat surfaces as sometimes received.

Quotations must be per 1,000 dowels c.i.f. London or other United Kingdom port, although a few of the importers who possess established United States connections are alternatively open to consider offers f.o.b. steamer Canadian port in Canadian currency.

REVIEW OF THE PAPER TRADE IN GREAT BRITAIN

TRADE COMMISSIONER J. E. RAY

Manchester, February 7, 1923.—To those who have followed closely the disheartening and alarming fortunes of the paper trade in the United Kingdom during 1921 and the first eight months of 1922, the present comparatively prosperous state of the mills and merchants is as surprising as it must be gratifying to those who are associated with the paper industry and trade.

Some idea of the depression in the early months of 1922, and the improvement that set in about August of the same year, may be gathered from statistics relating to unemployment in the industry and the volume of exports. It is reported that 61,000 hands are engaged in the paper mills. From January to April, between 6,000 and 7,000 employees were drawing full unemployment pay; by the end of November the number had declined to 4,391. The quantity of all grades of paper (including stationery, etc.) exported during the month of January was 7,345 tons, a quantity which rose to 13,332 tons in September, and to 15,350 tons in November. The latter figure exceeded that of any single month since the cessation of hostilities, and also exceeded the monthly average of the pre-war year 1913.

The revival of trade with home buyers was not so marked, as apparently the domestic consumers passed on larger orders than usual to mills outside the United Kingdom.

It is learned from conversation with some of the leading Manchester paper manufacturers and merchants that competition from outside sources has been very keen, and that it cannot be ignored at the present time in many grades of paper. It was expected that competition from Germany might be serious, but so far there has been little to fear in that direction. In pre-war days, imports of wrappings from Germany used to average 3,500 tons a month, but during 1922 they averaged only 1,100 tons. Printings from the same source in 1913 were about 2,000 tons a month, but the quantity does not now exceed 300 tons a month. Finland's contribution to the total imports of printings and wrappings has increased, but the effect of this competition may diminish if Russia should purchase on an appreciable scale in the present year.

Although the foregoing revival has taken place, it is well to state that the imports of paper have also increased rapidly. During the last five months of 1922, the monthly average of imports was 52,000 tons, which was only 3,000 tons per month less than the average of the pre-war year 1913.

IMPORTS FROM CANADA

Canada may justifiably be proud of the growth of her exports to the United Kingdom of various kinds of paper during last year. There are no detailed statistics covering the imports into Manchester or into the whole of the United Kingdom during 1922, but those relating to printing and wrapping paper show an advance from 5,203 cwt. in 1921 to 189,981 cwt. last year. This was a much larger percentage increase than that recorded by any other country. Sweden's increase was less than 1,000 cwt. Imports from Canada in 1913 were slightly less than 59,000 cwt.

The imports of packing and wrapping paper from Canada show an equally gratifying increase. From 17,584 cwt. in 1921 they rose last year to 116,876 cwt., which again is a much larger percentage increase than that recorded by any other country. The quantity brought in from Canada in 1913 was only 992 cwt.

PROSPECTS FOR 1923

The general impression among importers is that Canadian paper manufacturers may expect to transact satisfactory business in the United Kingdom during this year. It is understood also that prices are likely to be firm for some considerable time. A report is to hand that the Americans have recently purchased 100,000 tons of wrappings from Scandinavia, which has had an influence upon the stocks held in the latter country. Nevertheless, formidable Scandinavian competition is anticipated.

It is gratifying to hear Canadian kraft so highly eulogized by consumers. The only defect seems to be the inadequacy of supplies to meet the increasing demand.

STATE OF TRADE IN MANCHESTER AND DISTRICT

Trade Commissioner J. E. Ray

Manchester, February 2, 1923.—Undoubtedly the closing days of January have witnessed a decided improvement in many branches of industry. The unsettled state of Europe consequent upon the recent action of France in the Ruhr district has probably tended to retard an improvement in trade generally, but at the same time it has given an impetus to the iron and steel and coal industries of Great Britain.

Perhaps the most noteworthy revival is associated with the wagon (freight car) industry. Users of wagons have held back as long as possible in the hope that constructional costs would fall, but the sudden activity in the industries named has forced the construction of these vehicles, and all centres engaged in wagon-building report a glut of orders.

January also saw a distinct change for the better in the Lancashire industry, but it did not assume the nature of a boom, or even an introduction to it. However, the millowners and the merchants are in a more cheerful mood than for many months past. It is expected that the demand for textiles will steadily advance during the spring.

For some months past the spinning mills engaged on American cotton have been running only four days a week. Yesterday a fresh ballot was taken which resulted in a failure to obtain the four-fifths majority necessary to prolong the curtailed hours of production; consequently the spinners are free to run on full time if they so desire.

Engineering Industries.—In some sections of this territory several branches of the engineering industries report more activity than has been experienced for some time past. The textile machinists are still busy, and are likely to be throughout the spring.

The well-known flour-milling engineers, Henry Simon & Co., Limited, will, if the Manchester City Council signify approval, erect a model works at Withington, a few miles from the centre of Manchester, occupying a site of 12½ acres. The works are to be entirely electrically driven, and a model village is to be built for the work-people.

Leather; Boots and Shoes.—The tanneries of the district do not report an appreciable improvement of trade. Apparently, there is a good deal of hesitancy on the part of boot and shoe manufacturers to purchase freely at present prices. The latter are making a determined effort to increase the demand for footwear by manufacturing at the lowest possible cost, and of course cheap leather is an essential to the lowering of production charges.

Northampton reports a number of failures among firms who have been unable to weather the storm of the last two years.

Produce.—Danish bacon has this week fallen by 4s. per cwt., present prices ranging from 106s. to 110s. American bacon is in poor demand. Canadian is selling at 84s. to 90s. per cwt. It is expected that the near approach of Irish bacon arrivals will bring down the prices of competitive lines, Danish in particular, as the killings in Denmark are reported to be heavy.

Butter is scarcer than usual, due to weak arrivals from New Zealand and the purchase of Danish makes by the United States. Prices are approximately 205s. per cwt. for Danish, and 198s. to 200s. for Swedish.

Cheese is far from plentiful, and it is likely to become dearer. Coloured New Zealand is commanding 132s. and white 139s. per cwt.

Eggs are in better demand. Current prices are: Irish selected, 23s. to 23s. 6d.; ordinary, 22s. 6d.; Danish, 18 pounds, 25s. to 26s.; and 16 pounds, 22s. 6d. to 23s. 6d.; Egyptian, 10s. 6d. to 11s.; Chinese, 14s. 6d. to 17s.

AUSTRALIAN FINANCIAL CONDITIONS

TRADE COMMISSIONER D. H. ROSS

Melbourne, January 23, 1923.—While there is no decided change to report upon financial conditions in Australia at the opening of 1923, yet it is undoubted that there has generally been a decided improvement in trade conditions and in industrial and other investments during the last twelve months.

In 1922 the Australian bond market witnessed a substantial recovery exceeding the most optimistic expectations. In gold-mining there has been no improvement, consequent upon adverse economic conditions and the absence of any new discoveries of the precious metal. Industrial preference stocks have advanced, as is illustrated by the fact that 21 representative stocks on the Australian market showed an advance of 12½ per cent for the year, thus reflecting upon the lower interest rates and confidence in industrial enterprises. Bank shares also participated in the advance of investment stocks, and at the end of 1922 the average of nine leading banks approximated 14 per cent higher than at the beginning of the year. (It may be stated that Australian bank shares are now nearly 40 per cent higher than in 1913 and, making due allowance for the depreciation of money purchasing power, this places them in approximately the same position as they were ten years ago. The counter attraction in industrial enterprises may prevent any marked increase in bank shares.)

The financial feature of 1922 was the advance in the industrial *ordinary* share market, for which a comparison is made on 21 leading stocks on the Australian market which appreciated by about 22 per cent in this year. While the country has not progressed at the same ratio, the price improvement indi-

cates restored confidence in monetary and industrial conditions. How far this improvement will go, or will be maintained, is uncertain in a comparatively new country, in which no set standards of stability have been fixed.

The Premiers of two Australian States are now en route to London, where the conversion of early due loans will receive their attention, and, provided the market is favourable, they may be disposed to accept further financial assistance for immigration and development purposes.

With Federal and State commitments of great magnitude to adjust at a comparatively early period, it should not be surprising if the money market were approached for assistance, although the renewal of internal war loans approximating huge figures is not likely to cause anxiety. In the meantime, the revenue receipts of both the Federal and State governments have expanded considerably, but concurrently so have the working costs of railways and other public enterprises.

TRADE CONDITIONS AND RETURNS

The marked expansion in the number and output of Australian woollen mills continued during 1922, and several additional plants of some considerable magnitude are now in process of completion. It is stated that some mills are already experiencing difficulty in disposing of their manufactures (despite the heavy duties upon imported woollens), and the more enterprising companies are taking steps to exploit export trade.

In iron and steel products the outlook is uncertain. For months past it has been anticipated that the big steel plants at Newcastle and Lithgow, N.S.W., would resume operations, and hence importers have only ordered bare requirements. Recently, the wages schedule of the operatives has been revised on a basis satisfactory to the companies and employees. A Royal Commission is now inquiring into the question of essential cheaper coal, but the miners refuse any reduction in their present ruling rates and the mine-owners are not disposed to accept lower rates for their product. The New South Wales Government is making strenuous efforts to have the steel plants in operation, and former employees are desirous of being again in active employment.

Commonwealth trade returns for the first five months of the fiscal year are thus compared:—

	1921-22	1922-23
Imports, July to November	£35,588,211	£55,178,866
Exports, July to November	45,963,448	44,900,010

In comparison with the previous period, imports increased by £19,590,655, while exports decreased by £1,063,438, but in the latter regard, it is anticipated that the figures for December and January will show an encouraging advance. The increase in imports was mainly in apparel, textiles and yarns, this general classification being responsible for an advance of no less than £10,566,232, followed by metals and metal manufactures (excluding machinery) to the extent of £3,114,064.

There is no change of importance in the wheat and flour position. Millers are fully engaged in export trade, and wheat is being rapidly transferred to the seaboard for shipment oversea.

The mail closes with some trade depression, which is not an unusual experience with importers between seasons. The volume of trade inquiries recently received has been well above the average. There is also some uncertainty in regard to the political situation and the probable merging of two parties (both in a minority) to form a new Commonwealth Government which meets Parliament on February 28.

GOVERNMENT AID TO FARM WORKERS IN AUSTRALIA

C. Hartlett, Office of the Trade Commissioner

Melbourne, January 23, 1923.—As an aid to the immigration of farm workers, which the Commonwealth and various Australian States at the present time are making special efforts to encourage, an amendment has been made to the Housing Act of the State of Victoria to authorize advances to farmers who desire to employ immigrant farm workers but are unable to do so owing to lack of living accommodation. The amendment authorized the State Government Savings Bank to supply the need, every farmer being made eligible for a house for the purpose outlined.

It is hoped that this legislation will overcome the difficulty which often occurs when immigrants arrive prepared to take work with a farmer, but find the accommodation unsuitable, particularly in the case of married couples with one or two children.

The advance will be covered by a mortgage over a few acres on which the house is to be built. If the farmer has already given a mortgage over his property, it will be necessary for arrangements to be made to allow the bank to take a first mortgage over the area allotted as a site for the house, subject to which the house and site may be included in the mortgage over the whole area of the farm.

It is estimated that the cost of each house will be about £100, of which a 10 per cent deposit would be payable, and the balance by instalments equal to about 12s. ($2.92) per week.

USE OF GYPSUM AS A FERTILIZER

C. Hartlett, Office of the Trade Commissioner

Melbourne, January 23, 1923.—While no doubt the virtues of gypsum as a fertilizer are more or less known to Canadian farmers, the result of recent experiments made by the Department of Agriculture of the State of Victoria will not be without interest, particularly in its application in conjunction with superphosphate to certain poor wheat lands in comparison with other fertilizers. The experiments were carried out over a period of eighteen months, and quarter-acre blocks consisting of light soils were chosen in the northwestern part of the State, which without fertilizer had been averaging only 6½ bushels of wheat to the acre.

The effect of gypsum, usually regarded here as not being useful for wheat, produced rather remarkable results according to the report of the Department of Agriculture. A dressing at the rate of 1½ tons per acre, applied with 1 cwt. of superphosphate, increased the yield by 20·9 bushels as compared with the crop grown without fertilizer. Superphosphate by itself increased the yield on another block by 9·8 bushels per acre, so that the use of gypsum increased the yield by 11·1 bushels per acre. These results were obtained in the 1921 season and were confirmed in the following season.

The following table gives details of the heavy increased yield of wheat obtained by the use of various fertilizers during the two seasons 1921 and 1922:—

	Bushels per Acre 1921	Bushels per Acre 1922	Average for the Two Years
No fertilizer	6.5	9.0	7.7
Basic phosphate 1 cwt. per acre	14.7	16.7	15.7
Superphosphate 1 cwt. per acre	16.3	15.1	15.7
Superphosphate 2 cwt. per acre	21.4	20.2	20.8
Superphosphate 1 cwt., and gypsum 1½ tons per acre	27.4	25.6	26.5

Commenting on the above table, the report of the Department of Agriculture states: "It will be noted that on the average 1 cwt. of superphosphate has increased the yield by 8 bushels per acre, that dressings at the rate of 2 cwt. per acre have increased the yield by 13·1 bushels per acre, and that where the gypsum is applied with 1 cwt. of superphosphate an average increase of 18·8 bushels per acre has resulted."

Taking the market price of superphosphate and gypsum into consideration, plus a liberal allowance for freight, and assuming the effects of gypsum would last for five crops, it is estimated that an extra profit of 52s. 6d. per acre would be shown for each crop.

It is clearly stated in the report of the department that the results obtained are only preliminary ones and do not as yet justify the use of gypsum by farmers. The experiments, however, are to be followed up with more comprehensive and certain tests this year, after which it is hoped that definite advice can be given as to the general use of gypsum in the wheat-growing sections of the State.

GROWING CONFIDENCE IN INDIA'S FUTURE

TRADE COMMISSIONER H. A. CHISHOLM

Calcutta, January 18, 1923.—On every hand signs and portents indicate a strong and growing confidence in the future of India. The year 1922 witnessed the gradual subsidence of the non-co-operation movement, following the imprisonment of its high-minded but misguided leader, Mr. Gandhi. Toward the end of 1922, non-co-operation met with final debacle when the "Nationalist Congress" at Gaya split on the rock of the question of participation in the government councils under the new reforms. One camp of the Congress Party was for entering the government councils in order to wreck them, and the other clung to a policy of wrecking them from without by non-co-operation. The whole Congress movement was further discredited both in India and abroad when its agents in Europe announced its Bolshevist aims and proposed the repudiation of all the debts of the Government of India, should they ever accede to power.

GROWTH OF IDEALS OF CO-OPERATION IN GOVERNMENT

Coincident with the death of non-co-operation, most of the influential Indian leaders have declared their intention of devoting themselves to the ideal of self-government for India as a Dominion within the Empire. Some of them have expressed themselves as being dissatisfied with what they considered the slow rate at which self-government was being achieved. But the majority are now beginning to realize that India must learn to walk before she runs, and that therefore they must be content with the gradual assumption over a long period of years of the functions and the institutions of self-government.

As political conditions underwent rapid improvement, India's trade and industry showed signs of buoyancy and prosperity. Two good monsoons in succession had provided the masses of the country with sufficient food, and during the past year the prices of foodstuffs continued to decline. Export trade gradually expanded, and the last few months of 1922 provided growing favourable trade balances.

RISE IN RUPEE EXCHANGE AND VALUE OF INDIAN SECURITIES

The effects of these favourable factors are now making themselves apparent in the rise in the exchange value of the rupee both on London and New York, and in the impressive market appreciation of Indian government bonds and

shares on the London Stock Exchange. A few months ago it required 350 rupees to buy a 100-dollar draft on New York. Now 321 rupees will suffice. During the same period the value of the rupee in London rose from around 1s. 3½d. to 1s 4¼d., notwithstanding the great appreciation of sterling itself. Probably the most significant feature pointing to Indian stability is the recent marked strength displayed by Indian government securities in London. Indian war bonds, provincial bonds and Indian railway securities all share in the upward movement, with good prospects for the maintenance and even enhancement of such values, particularly if peace is established with Turkey. The belief appears to be well-founded that India is becoming firmly set for a period of development politically, industrially, and commercially that will place her in the front rank of the world's nations.

THE SITUATION IN SWITZERLAND

Trade Commissioner W. McL. Clarke

Milan, February 5, 1923.—The barometer of economic conditions in Switzerland registers the backward and forward movement of industry, and during 1922 the indicating needle has unfortunately been in the wrong direction. In fact various discouraging features have characterized Switzerland's economic life during the past year. Foreign exchange and tariff barriers coupled with the diminished purchasing power of outside countries, where industrial Switzerland has been accustomed to export its products, have combined to deprive the country of many of its best foreign markets. Thousands of workmen have had to be either temporarily or permanently discharged, and many important industrial establishments have had to close their doors. Some even have emigrated—thus taking both workmen and industry out of the country; others have had to forgo dividends, while the reserves and capital of still other companies have been considerably reduced. It is not surprising then to learn that the number of industrial failures in Switzerland has never before reached the total of last year.

Another contributing factor to the industrial crisis is the cost of production at home, which has been appreciably higher than in competitive countries. These production costs have been materially affected by the persistence of high wages incident to the unabated cost of living, and by the direct and indirect taxation in force in Switzerland. Given this higher cost of manufacturing, it has been extremely difficult for Swiss goods to sell on a competitive basis in foreign countries with the more cheaply manufactured products of her nearby neighbours.

The Government, to prevent the dumping of these foreign products into the home market and for fiscal purposes, introduced in 1921 a more protective tariff, and this has assisted certain Swiss manufacturers to keep their heads above water. In another direction, moreover, the Swiss Confederation has come to the aid of certain of the national industries, e.g. those manufacturing watches and embroideries, for which subsidies valued at 11,000,000 francs and 5,000,000 francs have been latterly allocated.

To further relieve the unemployment situation, the Confederation, the municipalities and the industrialists themselves have paid in actual disbursement up to the end of August last some 404,000,000 francs toward assisting those actually unemployed. Not only this, but public works, which otherwise would have been deferred, have been undertaken with the view to keeping busier some of the industrial establishments. The result has been therefore that the unemployment figures, which stood at 137,561 at the end of November, 1921, had dropped to 73,028 by the end of November, 1922.

FOREIGN TRADE FIGURES

Not all Swiss industries have suffered similarly, and those working more especially for the home market were the last to feel the crisis; but even here the purchasing power of the home consumer has perceptibly decreased. An encouraging feature recently noticed is that certain lines of manufacturing—e.g. those devoted to the production of chemicals, boots and shoes, silk and cotton goods, and even watches—are again beginning to receive orders from foreign countries. On the whole, however, sales abroad show as yet but little revival, and this fact is reflected in the most recent trade returns, viz. those for the first nine months of the past calendar year, when compared with those of preceding years, even though it is to be kept in mind that market prices have latterly decreased.

	1922 Swiss Francs	1921 Swiss Francs	1920 Swiss Francs	1913 Swiss Francs
Imports—				
First quarter	445	783	1,043	480
Second quarter	408	553	1,095	464
Third quarter	503	408	1,069	472
Fourth quarter	....	552	1,028	504

	1922 Swiss Francs	1921 Swiss Francs	1920 Swiss Francs	1913 Swiss Francs
Exports—				
First quarter	422	496	866	324
Second quarter	455	513	899	340
Third quarter	441	631	820	347
Fourth quarter	....	501	692	365

SECURITY PRICES

The situation of the security market during 1922 is reflected in the following index table just published by the Swiss Banking Corporation:—

Index of Swiss securities	45 Stocks	21 Shares	Total
Par value	1,243.03	529.90	1,835.90
In million francs	100%	100%	100%
		In Million Francs	
1913—December	90.57	183.00	117.56
1914—July	90.85	179.23	116.28
1916—December	81.22	159.51	106.51
1917—December	77.61	160.38	104.34
1918—December	75.49	150.07	99.57
1919—December	67.02	107.10	79.97
1920—December	59.07	76.27	64.63
1921—December	71.26	69.80	70.79
1922—January	72.86	72.08	72.60
February	77.43	74.47	76.47
March	78.28	74.08	76.92
April	79.36	71.14	76.70
May	82.44	80.39	81.78
June	83.26	83.65	83.39
July	83.41	83.05	83.29
August	87.22	87.70	87.38
September	87.75	90.43	88.61
October	82.05	83.32	82.46
November	85.38	86.68	85.85
December	85.51	88.25	86.39

From this table it is evident that the prices of bonds and shares alike appreciably improved from January to September of 1922, and although the proposed capital levy caused a sharp setback during October, yet, once a national pronouncement had been given against this venture by the referendum, the Bourse quotations began again to harden and the year closed with security prices but slightly under the highest quotations for the year.

SWISS FINANCIAL SITUATION

The total debt of the Swiss Confederation is now placed at 2½ billion francs, and although the estimated budgetary deficits for 1922 and 1923 are considerably under the actual deficit of 1921, yet the increasing national debt

is believed to give ground for serious reflection. The situation is summed up in the following table:—

	Swiss Francs
Ordinary budget deficits, 1914-21	475,394,300
Estimated ordinary budget deficit, 1922-23	183,300,000
Extraordinary expenses, 1918-21	497,271,329
" " 1922-23	230,000 000
Total	1,385,965,629
Cost of mobilization during the war	1,155,419,820
	2,541,385,449

Of this debt some 521,706,417, or about 20 per cent, due to special war taxes, has been amortized up to the present. In the foregoing figures account has not been taken of the deficit of the State railways, which at the end of 1920 almost reached 2 billion francs.

The augmenting of the Swiss national debt may be largely attributed (1) to Government subsidies, (2) to the cost of operating the federal services, (3) to the extraordinary expenses non-existent before the war, and (4) to the service of the public debt. To bring about effective economies there has been recommended (*a*) the suppression of federal subsidies, (*b*) a more businesslike employment of public servants, (*c*) fewer doles to unemployment, and (*d*) a reorganization and revision of the federal, cantonal and municipal taxation.

Customs receipts, it is to be noted, for the first eleven months of 1922 stood at 141,094,394 francs and were 45,570,420 francs higher than during the corresponding period of 1921; but it has been well pointed out that the customs revenue varies appreciably with the fluctuations to which the country's economic life is subject.

CONCLUSION

It is found then that Switzerland has pressing economic problems to solve, and that these internal problems are intimately related with the international markets, as the country is pre-eminently industrial and largely depends economically on her exports of manufactured products. While the foreign outlets for these commodities are restricted, the reflex influence is deleteriously felt at home. Once a return or even an approximation to normalcy occurs in the international trade emporiums, the Swiss economic situation will be materially improved. It is not so much that Swiss industry is running behind, but rather that the trade machinery of other countries is out of gear. Repair the trading facilities of the one group, and Switzerland will again function along normal lines. Economically it is being shown that the Swiss cannot live for themselves alone.

TRADE WITH OCCUPIED GERMANY: WARNING TO TRADERS

The British Board of Trade, through the *Board of Trade Journal*, draw the attention of British traders to the fact that, in virtue of recent measures taken by the French and Belgian Governments, the control of the importation and exportation of goods by firms situate or established both in the former Occupied Territory of Germany and in the Ruhr, and the power of fixing the conditions under which import and export licenses may be granted, is now vested in a Special Allied Committee. The German Government have, however, refused to recognize the validity of any licenses issued by the Allied authorities in the Occupied Territory since January 23 of importation into, or exportation from, the Ruhr or the former Occupied Territory. Goods so licensed should, therefore, not be forwarded by any route which involves transit through German territory not occupied by the Allies.

TRADE AND INDUSTRY IN FRANCE

Trade Commissioner Hercule Barré

Paris, February 1, 1923.—A glance at the figures given by the Direction Générale des Douanes shows that the imports into France, which reached nearly 2,000 million francs in July, dropped to 1,950 million in August, and to 1,893 million in September, but in October rose to 2,108 million. Exports show a decline, which is reflected in the unfavourable balance of trade, amounting for the month of October to 171 million francs. As regards imports, the increase in tonnage is far greater than the increase in value. During 1922, France imported over one million tons more than in 1921, owing principally to increased purchases. In view of the fact that 1921 was a critical one for business and that 1922 showed a recovery, it may be concluded that French industry and trade in general have profited by the improved conditions and made good in the home but not in foreign markets.

The increase in imports of raw materials was necessary to French industry and for the work of reconstruction in the devastated regions. The importation of manufactured products has been hampered and curtailed by the high tariff; on the other hand, exports have been adversely affected by the fact that the purchases of raw materials have been chiefly utilized by French industries for the needs of the home market.

The economic situation is unbalanced, and can only become still more so if France's purchases in foreign countries are not compensated for by her exports to foreign markets. This situation can only be improved when a reduction takes place in the cost of living and (concurrently) a decline in the prices of products for export.

ASPECTS OF THE PRINCIPAL MARKETS

During the last three months the linen market has been very active and prices very firm. Generally speaking, the market for textiles was an excellent one during the last few months of 1922, and the large centres in the north of France are hard at work on important orders to be delivered in the summer of 1923. Prices remain firm in proportion to the rates for raw material, which are still very high in the markets of origin and also at the colonial auctions in London.

The silk market was adversely influenced in October by the sudden rise which took place on the Japanese market, and in November by the upward leap of the pound sterling and of the dollar, which made the price of silk advance, thus resulting in hurried purchases which greatly embarrassed the manufacturers. The new United States tariff is likely to have a strongly adverse influence upon this industry, which hitherto exported in large quantity to the United States.

BULGARIA'S WOOLLEN INDUSTRIES

Of Bulgaria's eighty-two woollen factories among which several are of a considerable size, a great number is to be re-equipped this year, when there should be an apportunity to sell textile machinery, says *Kelly's Monthly Trade Review*. The woollen industries in Bulgaria are coming to the fore; and although in texture the cloth manufactured is stated to be durable, with quite a good appearance, it is not exactly exportable. It is stated that considerable Rumanian capital is invested in the Bulgarian woollen industries. The number of mills in Rumania is about the same as in Bulgaria, but the product turned out is even inferior to the Bulgarian product, uniform cloth and coarse blankets being the chief output. The Rumanian mills contain about 1,450 power looms.

MARKET FOR ELECTRICAL GOODS IN CHILE

Mr. B. S. Webb, Canadian Trade Commissioner in Buenos Aires, has transmitted a report on the Chilian market for electrical goods which has been prepared by Mr. C. H. Bateman, H.B.M. Chargé d'Affaires, Santiago, Chile, of which the following is a summary:—

Electric light fittings and accessories, radiators and fires, electric motors, electric lighting sets and switches enjoy a ready sale in Chile and are imported principally from the United States, though before the war the chief source of supply was Germany. English electric motors are practically unknown, as they do not show the same characteristics as the American fittings, which are more lightly built and cheaper.

There is a demand for lead batteries for general use, but it is largely for automobile batteries (starting and lighting) of 6/8 volts and 12/16 volts. Nearly all batteries imported come from the United States, and are for American cars. This may be explained by the fact that cells made in Europe are of celluloid, whilst those from America are of hard rubber and give better results. The Exide battery is in the greatest demand at present; the quality of batteries should be between medium and best. Care must also be taken to indicate for what cars the battery may be used.

The amount of business done in Chile in electrical heating and cooking appliances is small, in proportion to the population. The principal reason, especially in the household lines, is that the electric power companies offer no facilities to the public and have always maintained high prices for current, there being no reduction for ranges, radiators or other heating and cooking appliances. The demand, however, notwithstanding these disadvantages, is slowly but steadily increasing, especially for radiators, which are largely used for commercial offices. The electric cooking stove, on the other hand, has practically no sale, most of the cooking in this country being done on gas, wood and coal stoves and charcoal burners, which are much cheaper than electricity at its present cost.

As to prices, owing to the constant fluctuations of exchange, it is almost impossible to give any fixed quotations. However, a list of local (approximate) retail prices is on file at the Department of Trade and Commerce, Ottawa, and will be furnished to interested Canadian firms on application to the Director, Commercial Intelligence Service, as well as a list of electric light companies in Chile.

EXCHANGE AND TRADE CONDITIONS IN BRAZIL

Trade Commissioner E. L. McColl

Rio de Janeiro, February 9, 1923.—Exchange is still very sensitive, though during the first week in February it has been fairly steady, remaining around six pence or 8$600 to the dollar. The sharp fall during the first week of January, when on the 8th and 9th exchange went to 5·314d. or 9 milreis to the dollar, caused considerable apprehension in trade circles, especially among importers, and some Brazilian houses went so far as to cancel orders. The uncertainty of exchange has caused a slight reappearance of this practice, which was so prevalent during 1920.

For the ten months ending October visible exports over imports gave a favourable balance of trade of $72,500,000. This amount will probably reach a total of $90,000,000 for the year. However, it is estimated that remittances abroad to cover interest on federal and state loans, and invested foreign capital, will more than offset this amount. It looks therefore as if, in the mere question

of supply and demand for foreign bills on the local market, there would not be a sufficient surplus to cause any appreciable rise in the milreis; in fact there might not be a sufficient supply to meet the demand.

Internal trade is very active, some factories reporting that they have trouble in filling orders on time. Among importers, however, trade is dull and cannot improve while the milreis remains as low as 6d. or 8$6 to the dollar.

Imports and exports for the ten months ending October for the years 1913, 1920, 1921, and 1922 in £1,000 are as under:—

	1913	1920	1921	1922
Imports	56,994	101,961	53,783	39,836
Exports	51,018	96,015	48,037	55,624

The figures for 1922 show up very favourably in comparison with previous years. However, it is feared that the increased remittances required for service of foreign debt will fully offset this favourable difference.

Amongst the different products imported during the nine months January to September, the following show an increase over the same period last year:—

	1921 Tons	1922 Tons
Codfish	12,622	14,177
Cement	101,790	230,655
Wheat flour	39,692	89,791
Rubber products, manufactured	544	1,215
Paper	22,504	31,191
Chemical products, drugs, etc	9,526	26,416
Coal	683,820	960,532

During the same period the following are a few of the products which have decreased in imports:—

	1921 Tons	1922 Tons
Iron and steel (raw material)	34,454	23,999
Lumber	12,110	10,533
Iron and steel, manufactured	166,855	134,724
Machinery, tools, etc	47,220	31,026

On and after March 31, 1923, customs duties will be payable on the basis of 60 per cent gold and 40 per cent paper. The previous rate was 55 per cent gold and 45 per cent paper. The fact that gold to paper is in the ratio of 4·752 to 1 will show to what extent this will cause an increase in customs duties. This fact will have a very material effect upon the reduction of imports into Brazil.

SHORT POSTAGES BETWEEN CANADA AND UNITED KINGDOM

Attention has been repeatedly drawn in the *Commercial Intelligence Journal* to the fact that letters addressed to Great Britain, Newfoundland and other British possessions are still being mailed shortpaid, as they are being prepaid only 3 cents instead of 4 cents for the first ounce. The Executive Council of the Canadian Chamber of Commerce in London have recently passed a resolution strongly urging that in view of the serious inconvenience and monetary loss occasioned by surcharge on Anglo-Canadian letters, owing to insufficient postage, the council invite business houses both in Great Britain and Canada to take steps to ensure that the correct postage is attached to all letters.

Canadian firms are again reminded that the letter rate to Great Britain, Newfoundland and the British Possessions generally is 4 cents for the first ounce and 3 cents for each additional ounce, and that the postage rate to foreign countries generally, with the exception of the United States and Mexico, is 10 cents for the first ounce and 5 cents for each additional ounce.

CANADIAN REPRESENTATION IN SCOTLAND AND IRELAND

Trade Commissioner Gordon B. Johnson

The question of the proper representation of Canadian manufacturers in overseas countries is one for which no hard and fast rules can be laid down. Each case demands particular consideration as its special treatment depends upon many factors which urge one method in the case of one commodity or manufacturer and another method in the case of another.

Having satisfied himself that his product is in demand in a particular market, say Scotland, and that he can compete in price and quality, and that the capacity of his factory requires an overflow at all times to markets abroad, the manufacturer has thus begun in the right way to secure a permanent and lucrative field for the development of his business. But this is only the beginning and not the end. Export trade requires more educated intelligence, harder work, more courage, and much more persistence than is needed in the case of domestic business. Too often there is evidence of pessimism which shows itself in halting and feeble efforts, a reluctance to take essential steps, followed by an early withdrawal. Then there are men inbred with self-confidence engendered by success in the home field who refuse to profit by repeated advice from people who are able to impart information as to the requirements of the markets concerned, who also eventually drop out.

Assuming that the firm concerned is determined to thoroughly exploit the overseas market with a good line which is likely to be acceptable, it is always desirable for the head of the firm or one of the chief officers to personally explore the field before appointing any representative. By doing so, he becomes acquainted at first hand with the requirements of the market and with the competition to be faced, and gets into personal touch with the trade. He carries home and retains a mental picture of the situation which no amount of correspondence can take the place of. When he receives later an order from John Jones & Co., he very likely remembers Jones himself and what his establishment looks like, how they carry on business, and whether they are a good sound concern who will meet their obligations. He will, furthermore, while on the ground, have the opportunity of selecting a representative. Such a representative may be a commission agent who knows the business and already has a connection, and who can be trusted to separate the goats from the sheep among possible customers. The advantage of this type of agent, if he is not overloaded with different lines, is that his living depends upon securing orders. An important wholesaler or importer with a staff of travellers may be found to undertake exclusive representation either on a commission or buying basis, and carrying stocks. These are the indirect methods of representation.

Direct methods consist first of the establishment of a branch office, and second the periodical visits of a traveller from the firm. The former method, because of the expense, can rarely be justified in most markets, but where it can be, the results are naturally greater than any other system can show. The latter is well worth while in certain cases. The writer knows of a case where a Canadian firm manufacturing a certain line of hardware is known everywhere among the trade in Scotland and Ireland. Their products are constantly in evidence, and the line is such that it seems surprising that any business at all can be done because of the severe competition from English, Continental and American manufacturers. The business is procured in this case by a traveller from the firm's headquarters who calls on the trade once a year. If it were not for his visits, it is very likely that the company would not do a dollar's worth of business and would remain unknown. This shows the value of personal touch and of the persistence which succeeds.

However, it is a fact that a great many companies who feel the necessity of selling their products abroad do none of these things. They apparently expect to do business by getting into correspondence with a number of wholesale merchants who may be interested and will place orders. Satisfactory business may possibly be done in this way and occasionally is, but apart from an occasional order it is safe to say that trying to do business abroad through correspondence, without direct or indirect personal touch, is generally doomed to failure. It is less likely to be successful than attempting business in the domestic market without advertising, and without travellers. To enter into correspondence with a number of merchants in order to feel the market and to obtain the services of a good firm or agent for exclusive representation or a commission arrangement, is one thing, but writing letters periodically to importers with a view to obtaining orders, is another. The personal touch and an exhaustive search for buyers are needed.

Probably all Canadian Government Trade Commissioners are only too familiar, as is the writer, with the type of letter from a firm new to the business of export trade, who sends forward an informative but long communication with *one* catalogue or descriptive leaflet and *one* price-list usually f.o.b. factory, asking to be placed in touch with buyers. One wonders if it ever occurs to the writers of these letters that it is necessary for the Trade Commissioner to approach sometimes as many as a dozen firms in order to do the inquiry justice, that with only one descriptive pamphlet and price-list available it is not desirable to let them leave the office, and that only one or two firms are likely to be sufficiently interested to take the trouble to go to the Commissioner's office to inspect them. He can of course visit likely firms himself, and usually does, but it is obvious that with perhaps as many as a dozen similar requests to deal with constantly, besides other urgent work that keeps him in a constant rush, such a letter necessarily cannot receive the attention it requires and deserves. A quantity of this descriptive matter should always be forwarded, and the results will be proportionately greater. No time should be lost hereafter in making an exclusive connection with an energetic and reliable firm or agent whose standing can be obtained from the Trade Commissioner and who may be recommended by him.

There are other companies by no means few in number, who apparently expect Trade Commissioners to act as their resident agents, and actually obtain orders and "show results". It should be obvious, but apparently is not to every one, that a *Commercial Intelligence* Service does not exist for this purpose. Even a commission agent cannot do justice to more than half a dozen manufacturers in more or less the same general line of business. It is quite out of the question therefore for a Trade Commissioner to actually place orders for several hundred. Furthermore "visible results" of this kind might lead to hard feeling upon the part of those manufacturers equally entitled to consideration who had failed to secure orders. The work of a Trade Commissioner is one of the rivulets which feeds the river of trade, not conspicuous, not very visible (and not intended to be) in actual transactions, but giving distinct increase and impetus to the volume and speed of the main stream.

The Scottish Market

A considerable number of Canadian manufacturers and exporters have branch offices or agents in London for the purpose of acquiring business in the United Kingdom. While each particular firm must decide its own representation on the merits of its own case, it is safe to say that in the majority of cases, London representatives alone are not sufficient to satisfactorily cover the United Kingdom.

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* The portion of this report which deals with Scotland is taken from an article published by Major Johnson in *Commercial Intelligence Journal*, No. 940.

That part of the country which is particularly out of the orbit of an agency or representative confined exclusively to London is the country tributary to Glasgow, and for which Glasgow is logically and actually the importing and distributing centre—that is the whole of Scotland, the north of Ireland to a great extent, and in some degree the north of England as well.

Small in area as the United Kingdom is in Canadian eyes, its power of absorption of a great variety of Canadian products is determined of course solely by its population. Proper representation of Canadian firms should therefore be determined, not by the area of the country, any part of which can be reached from London in twenty-four hours or less, but by the large numbers of great centres of population, which cannot be reached and covered from London without a complete organization for that purpose.

What chance, for example, has the London office or agent of a Canadian manufacturer to obtain orders from Glasgow importers or distributing houses? None whatever, without personal contact of some kind. As a general thing, it is quite impossible for the London representatives of Canadian firms to cover, or even attempt to cover, the whole field.

It is possible to quote several cases, even during the past year, in which the lack of a Glasgow representative was to be deplored, and others in which the opportunity to obtain such a representative was passed by. One instance may be given which is representative:—

An energetic firm of manufacturers' agents applied to the Glasgow office, desiring to represent a good firm of Canadian manufacturers of certain commodities.

A trade inquiry was accordingly forwarded to Ottawa and published in the *Commercial Intelligence Journal* in due course. A number of letters from Canada in response were received by the Glasgow firm, most of which were obviously of no use. But one or two were from prominent manufacturers with their own office or agent in London. Ignoring the request in the inquiry for a discussion as to a possible commission agency for Scotland, the companies concerned referred the Glasgow people to their London representatives for any business they might wish to offer *as merchants*. Now, this particular Glasgow concern have connections throughout Scotland, and, prices being competitive, they are in a good position to get business being in direct touch with buyers. They are, however, not merchants themselves, they are commission agents who desired an agency for this class of goods—quite a different line of business—and the attempt to treat the inquiry as one for goods instead of what it was, an inquiry for an agency, was merely stupid.

London is too far away from Glasgow's territory, and representatives there are too occupied with London itself and other large centres within an easy journey to pay attention to Scotland. Sitting in London waiting for orders from possible buyers in Scotland will not promote business. It must be worked for. That can only be done by Glasgow agents or brokers (who report either to the head office in Canada, or they may be sub-agents reporting to the London office) who know the business, who have the connection, and are constantly on the move trying to obtain orders. Buyers do not have to search for sellers; it is quite the other way about, and firms desiring business must have people on the spot whose living depends on finding buyers.

So far as Scotland or the North of Ireland are concerned, to try to obtain business by the instrumentality of a representative sitting in London, who probably has no time to visit the territory concerned, much less explore its possibilities, is precisely analogous to a manufacturer trying to get business in the domestic market without advertisement and without travellers.

It may be repeated that Glasgow is the great importing and distributing centre for the whole of Scotland, the North of Ireland, and to some degree the extreme North of England—a territory comprising a population of at least six millions, while Glasgow is itself a city of about 1¼ millions.

Representation in Ireland

The case of Ireland is rather different. Irish import merchants are engaged in a purely local Irish business. That is, their business of distribution may extend all over Ireland, but that is the end of it. In England and Scotland, however, large numbers of importers distribute imported goods not only in their own home market, but also to many other parts of the world, including Ireland. This entrepot trade, as it is called, is carried on from the centre of a web which extends throughout the civilized world, with the aid of the equally extensive machinery of British banking and shipping. Eigthy-three per cent of Irish imports come from or through Great Britain. The indirect imports—that is, those that come into the country from Great Britain which are not produced there, but which pass through the hands of British merchants—therefore to a very great degree hold the field for overseas goods. The exact proportion that this indirect trade bears to the whole import trade of Ireland is unknown, but it seems to be, it if is possible to use the same proportions as exist in the case of Irish exports, of about the same extent as the direct imports, that is the imports direct from countries other than Great Britain, or about 17 per cent of the whole. If this can be taken as correct, then the imports into Ireland are 17 per cent direct trade from abroad, 17 per cent indirect trade from abroad (through merchants in Great Britain), and 66 per cent from Great Britain. In deciding upon representation in Ireland therefore, it should be kept in mind that imports into Ireland from overseas countries are now handled probably in equal proportions by import merchants in Liverpool, London and Glasgow, who have Irish wholesale connections, and by Irish importers who import directly from abroad. The Canadian producer who wants to do business in Ireland must decide, therefore, whether his business in that country, if he does not intend to establish direct representation, shall be done through British agents, or import houses, or through Irish, directly. The commodity concerned has a good deal to do with the decision. Certain Canadian products for which there is a fair demand in Ireland do not sell in large enough quantities to warrant Irish importers forming direct connections with the Canadian houses concerned, and the latter could not receive from them orders sufficiently large perhaps to justify acceptance. Irish wholesale distributors are not in a position, in the case of the particular classes of commodities referred to, to order in the large quantities which Canadian exporters might be willing only to ship, and which British houses are accustomed to take in large quantities. The large scale on which many British wholesale houses do business enables them to obtain overseas commodities for distribution not only in Britain and Ireland, but in most of the countries of the world on terms which would not be granted in the case of smaller transactions. In the opinion of the writer, the political changes in Ireland will not affect this indirect business appreciably, if at all, and the prosperity in Ireland that may be looked for if the country settles down will show itself in increased trade both direct and indirect.

NETHERLANDS EAST INDIAN ANNUAL FAIR

Mr. W. P. Montyn, Consul General of the Netherlands, Montreal, writes that the Netherlands Fourth East Indian Annual Fair will be held at Bandoeng, Java, from July 28 to August 12, 1923. All commercial articles which are being exported from the Netherlands East Indies will be admitted to this exhibition. Pamphlets giving further particulars in regard to this annual fair are being distributed and will be sent free to business concerns and all interested upon application to the Secretary, Netherlands Indian Annual Fair, Bandoeng, Java.

AUSTRALIAN INVOICING REQUIREMENTS

The High Commissioner for Australia in London (says the *British Board of Trade Journal*) has received advice from the Commonwealth Department of Trade and Customs to the effect that the following procedure must be followed in future in regard to goods purchased from or through buying agents or commission houses:—

(A) *Goods purporting to be purchased on commission basis.*

The manufacturer's or supplier's invoice, duly certified in the manner agreed upon at the Imperial Customs Conference, 1921, must be produced to the Customs, together with a covering statement from the buying agent or commission house. This statement must show—

(i) the amount paid to the manufacturer or supplier on account of each invoice;
(ii) the charges paid on account of the Australian purchaser;
(iii) the amount and rate of buying commission.

(B) *Goods purchased on c.i.f. and e. basis.*

All such purchases are to be regarded as "straight-out" sales by the person offering the goods for sale (i.e., the person invoicing to the Australian buyer) and such person is to be regarded as the seller for the purposes of section 156* of the Customs Act and for the purposes of Customs Regulation 34A†. The invoice from the seller must show full details of charges included in c.i.f. and e. price, and how such charges are arrived at; for example, ocean freight, showing measurement and rate, cost of export, outside packages, etc., etc. The invoice from the seller must show on the face the name of the manufacturer or the person who supplied the goods to the seller. If the seller objects to show the name of the manufacturer or supplier on the invoice it will be sufficient if a separate summary of all shipments by each boat giving the necessary information, be forwarded confidentially to the Collector of Customs at each port concerned.

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* Section 156 of the Australian Customs Act, 1901-22, defines the term "genuine invoice" as used in that Act.

† Regulation 34A prescribes the manner in which goods imported into Australia shall be invoiced.

AUSTRALIAN CUSTOMS DECISIONS

C. HARTLETT, OFFICE OF THE TRADE COMMISSIONER

Melbourne, January 19, 1923.—Under recent by-laws issued by the Department of Trade and Customs the following are added to the list of materials and articles which may be imported into Australia at reduced rates of duty if used in the manufacture of specified goods, or for specified purposes within the Commonwealth.—

MATERIAL AND MINOR ARTICLES FOR USE IN THE MANUFACTURE OF THE UNDERMENTIONED GOODS WITHIN THE COMMONWEALTH

(Provided security is given by the owner that such will be used for that purpose only, and that evidence of such use be given to the satisfaction of the collector within six months, or such further time as the collector may allow, after delivery by the Customs).

Circles, copper, brass, Muntz metal, yellow metal, naval brass or bronze (plain or tinned, unpolished) (1) of gauges other than from 3 to 24 both inclusive, irrespective of dimensions; and (2) of gauges 3 to 24 inclusive, the diameter exceeding 4 feet, for the manufacture of metalware and general purposes.

Plates, sheets and segments, of copper, brass or Muntz metal, yellow metal, naval brass or bronze (plain or tinned, unpolished) (1) of gauges other than from 3 to 24 both inclusive, irrespective of dimensions, and (2) of gauges 3 to 24 inclusive, the dimensions of which exceed 8 feet in length or 4 feet in width, for manufacture of metalware and general purposes.

Strips, copper, over 4 inches in width (plain or tinned, unpolished) (1) of gauges other than from 3 to 24 inclusive; and (2) of gauges 3 to 24 inclusive; exceeding 8 feet in length, for the manufacture of metalware and general purposes.

Channels of brass, white metal, or plated metal not exceeding 1 1/16 inch square lined with felt, for use in manufacture of motor cars.

Nails (saddle coppered), pins (escutcheon steel), and tacks (machine shoe, truck brass plated capped and large oval headed, trunk tinned oval headed, and bright wire gimp), for use in manufacture of bags, trunks and leatherware.

Tubing, brass, oval, ¾ inch by ⅝ inch and under, made of metal of 19 gauge, or under, for use in manufacture of gauges.

Motors, electric, not exceeding ⅛ h.p., for manufacture of sewing machines.

Sulphur, for use in manufacture of hyposulphite of soda.

Headers, wrought iron, staggered, for use in manufacture of water tube boilers.

Lighting sets, electric, comprising generator, head and tail lights, horns, switch and ammeter, for use in manufacture of motor cycles.

Graphite, for use in manufacture of electric batteries, dry cells and refills for both.

Oil, pine, for use in manufacture of linament.

Iron and steel; round bars, any quality under ¼ inch; hoe point steel 18g. by 7g. by 2⅜ inch; special quality Tyne steel sheets 9g. by 72-inch by 24-inch comb strip 5/16 inch by 3/16 inch by 1⅜ inch; for use in manufacture of agricultural machines and appliances; sheets of 30 gauge for manufacture of metal ceilings and wall linings.

Zinc sheets, nickelled, for use in manufacture of nameplates, labels, and similar ware.

Acid, benzoic, for use in manufacture of medicinal products.

Aluminium angles (plain or otherwise), bars, rods, and mouldings (plain or with pins inserted), for use in manufacture of vehicles.

Dextrine for use in manufacture of paste and general purposes.

Balsam of Tolu, for use in manufacture of soap.

Gum, benzoin, for use in manufacture of soap.

Felt, for use in manufacture of railway cars.

Carbon black, for use in manufacture of suede leather cleaner.

Red lead, dry, for use in manufacture of paints and varnishes, and for general purposes.

Throngs, in the piece for use in manufacture of loose-leaf binders.

Wax, carnauba, for use in manufacture of polishes.

MACHINES, MACHINE TOOLS AND APPLIANCES

(But not the motive power, engine combination, or power connections, if any, when not integral parts of the exempt machines)

Twist, frames for manufacture of cordage, threads, twines, etc., and roll winding machines for winding twines, etc.

Polishing machines for plate glass.

Accumulators or storage batteries (electric of all sizes) for stationary service in connection with power, lighting and electric traction, also plates for use with same.

Agricultural machines and implements, provided they are specially constructed for use with cable ploughing engines and security be given that they will be used only in connection with such engines, viz.: beet root lifters; combined implements for rolling and harrowing or for cultivating, rolling and harrowing; cultivators; ditching machines; barrows; knifers; levellers and graders; manure distributors; mole drainers; ploughs; ridgers; rollers; seeders and planters, and scoops.

Chain or chains, wrought iron and steel, composed of welded links manufactured form metal ½ inch in diameter and over.

Cloth measuring machines for retail establishments.

Mats, press, for filtering oil.

Meters, alternating current polyphase watt hour.

Aluminium varnish pots, for use in manufacture of varnish, etc.

Machinery (matchmaking)—outer boxmaking, box closing and labelling, and packeting for wrapping wooden matches in dozens.

Machinery (broom and brushmaking)—brush trimming machines.

Machinery (textile) looms, single shuttle plain loom or worsted coating loom of single box type; spinning roller covering machines, brush dewing machines; electric notching and perforating machines.

Machinery (woodworking)—three-drum sandpapering machines; bow chucking machines for chucking the ends of bows to fit socket; automatic, continuous, saddle seat machines for use in the manufacture of chair seats.

Machinery (metal-working), cold headers, nut blanking machines, automatic pointers, automatic horizontal bolt head trimmers, and automatic thread rolling machines for manufacture of bolts and nuts by cold process; radial drilling machines, 5 feet radius or larger where the various speeds and feeds are obtained from gearing only, and not by means of belt-driven cones or involving the use of countershafts; shaping machines; chilled rolls, 22 inches diameter by 5 feet, for rolling copper and other sheets.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING FEBRUARY 27, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement on the nominal closing quotations for all the principal exchanges for the week ending February 27, 1923. Those for the week ending February 20 are also given for the sake of comparison.

		Parity	Week ending Feb. 20, 1923	Week ending Feb. 27, 1923
Britain .. .. £	1.00	$4.86	$4.7846	$4.7892
France .. .. Fr.	1.	.193	.0619	.0626
Italy .. .. Lire	1.	.193	.0491	.0491
Holland .. .. Florin	1.	.402	.4030	.4030
Belgium .. .. Fr.	1.	.193	.0547	.0547
Spain .. .. Pes.	1.	.193	.1595	.1592
Portugal .. .. Esc.	1.	1.08	.0456	.0445
Switzerland.. .. .. Fr.	1.	.193	.1919	.1911
Germany .. .. Mk.	1.	.238	.000044	.000044
Greece .. .. Dr.	1.	.193	.0119	.0127
Norway .. .. Kr.	1.	.268	.1887	.1887
Sweden .. .. Kr.	1.	.268	.2704	.2708
Denmark .. .. Kr.	1.	.268	.1960	.1988
Japan .. .. Yen	1.	.498	.4907	.4920
India .. .. R.	1.	2s.	.3220	.3255
United States .. .. $	1.	$1.00	1.0153	1.0171
Mexico .. .. $	1.	.498	.5002	.4984
Argentina .. .. Pes.	1.	.424	.3778	.3814
Brazil .. .. Mil.	1.	.324	.1164	.1169
Roumania .. .. Lei	1.	.198	....	....
Jamaica .. .. £	1.	4.86	4.7815	4.7985
British Guiana .. .. $	1.	1.	.9883-.9909	.9911-.9936
Barbados .. .. $	1.	1.		
Trinidad .. .. $	1.	1.		
Dominica.. .. .. $	1.	1.		
Grenada .. .. $	1.	1.		
St. Kitts .. .. $	1.	1.		
St. Lucia.. .. .. $	1.	1.		
St. Vincent .. .. $	1.	1.		
Tobago .. .. $	1.	1.		
Shanghai, China .. .. Tael	1.	.708	.7328	.7501
Batavia, Java .. .. Guilder	1.	.402	.3943	.3941
Singapore, Straits Settlements .. $	1.	.567	.5604	.5619

TENDERS INVITED

Australia

Copies of tender forms and specifications have been received from Trade Commissioner D. H. Ross, Melbourne, for material required by the Victorian Government Railway Department, Melbourne.

These tender forms and specifications are open to the inspection of interested Canadian manufacturers at the Department of Trade and Commerce, Ottawa, (refer to file No. 27748).

Tenders in conformity to the specifications should be promptly addressed to the Secretary, Victorian Government Railways, Melbourne, Australia.

Particulars of the requirements are briefly outlined thus:—

No.	Date of Closing	Particulars
35815.	March 7, 1923.	Supply and delivery of 14,250 lineal yards of canvas, as specified.
35814.	April 18, 1923.	Supply and delivery of one spruce cutting machine, as specified.

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain.	*Montcalm*	St. John	March 9
" " "	†*George Washington*	New York	" 10
" " "	†*France*	"	" 14
" " "	†*Manchuria*	"	" 15
" " "	*Montrose*	St. John	" 16
" " "	–*Melita*	"	" 17
" " "	†*President Roosevelt*	New York	" 17
" " "	*Andania*	Halifax	" 19
" " "	†*Aquitania*	New York	" 20
" " "	†*Empress of Britain*	"	" 22
" " "	*Montclare*	St. John	" 23
" " "	†*New Amsterdam*	New York	" 24
France	**Antonia*	Halifax	" 9
Union of South Africa	**Jekri*	St. John	" 28
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela.	*Chaudière*	Halifax	" 16
Barbados, Trinidad, British Guiana	**Canadian Harvester*	"	" 10
Bermuda, Barbados, Trinidad, British Guiana	**Mattawa*	St. John	" 20
Bermuda, Bahamas, Jamaica, Colombia, British Honduras	**Canadian Forester*	Halifax	" 22
China and Japan	*Manilla Maru*	Victoria	" 9
" " "	*President Jackson*	"	" 15
" " "	*Empress of Russia*	Vancouver	" 22
Australia and New Zealand	‡*Tahiti*	San Francisco	" 16
Australia only	‡*Ventura*	"	" 27

† Letter mail only. * Parcel Post and specially addressed correspondence only. ‡ Letter and Paper mail only. – Papers, Parcel Post and specially addressed correspondence only.

Note.—The *Melita* will be used for direct mail for the Continent, including direct Parcel Post to France.

EMPLOYMENT IN THE BRITISH BOOT AND SHOE INDUSTRY

Employment in the British boot and shoe industry continued slack during December and showed little general change; slight improvements in some districts were offset by declines in others, according to the British Ministry of Labour *Gazette* for January, 1923. Short time was worked to a considerable extent at all of the principal centres and the holidays at Christmas were extended sometimes to 10 days or more by many firms. The percentage of workpeople unemployed in the industry, as indicated by books at the employment exchange was 8·3 on December 18, as compared with 7 per cent on November 20. Returns received from firms employing 34,329 workpeople showed about 38 per cent on short time at the end of the month to the extent of about 13 hours a week.

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

1357. Barley Malt.—A firm of commission agents in Mexico City desire to receive quotations on 3,000 to 5,000 tons of barley malt, delivered c.i.f. Vera Cruz. If prices are suitable, there is the possibility of an extensive business being developed in this product. Telegraphic quotations preferred.

1358. Oats, Oilmeal and Cornmeal.—An old-established commission house in excellent standing in Barbados desires to obtain Canadian connections for oats, oilmeal and cornmeal. Suppliers must be in a position to quote competitive prices, and when necessary by cable.

1359. Grains, Cereals, etc.—A Marseilles firm desire to represent, on a commission basis, Canadian exporters of cereals, especially wheat and maize.

1360. Packing House Products and Feedstuffs.—A manufacturers' representative in Trinidad desires to obtain Canadian connections for packing house products, including lard and lard compound, for food products, and general feedstuffs such as oats, oilmeal, bran and pollard.

1361. Leather (Sole and Upper).—A London company who claim facilities for selling Canadian leather in the Baltic States and Central Europe invite samples and quotations, preferably c.i.f. Copenhagen, Hamburg, or Dantzig, from Canadian manufacturers. Their requirements are: sole leather—sides from dry hides, and buffalo bends; upper leather—glacé kid, black and coloured, box and willow calf, box sides, suede sheep and calf, glacé sheep in black and coloured—all in full chrome tannage. A fuller descriptive memorandum is in the possession of the Department of Trade and Commerce, Ottawa, and may be obtained on application, quoting file T.C.-4-150.

1362. Cheap Biscuits and Canned Fruit.—A firm in Kingston, Jamaica, are desirous of securing Canadian cheap biscuits and canned fruit (pears, etc.).

1363. Sardines (Canned).—A firm in Kingston, Jamaica, are desirous of securing Canadian sardines in tins, preferably from New Brunswick, and similar to sardines put up at Black's Harbour, N.B.

1364. Flour and Fish.—A firm in Kingston, Jamaica, are desirous of securing Canadian flour and Canadian dried and pickled fish.

CHILEAN EFFORTS TO REDUCE PILFERAGE LOSSES

Reducing pilferage by placing on ship captains the responsibility for missing or underweight cargo packages is the latest development in the international battle against this annual waste, says the United States *Commerce Reports*. The Chilean customs ordinance (art. 89, par. 3) provides that a fine may be imposed on the captain of the vessel where cases are found to have been opened or their contents removed without the written permission of the customs authorities.

In a recent case at Valparaiso, where it was found that 460 parcels of cargo had had their contents stolen before being discharged, a fine of 5 pesos per package was imposed on the captain of the vessel. The steamship company moved for dismissal, arguing that this was a distortion of the intent of the law. The decision was contested and brought before the Chilean Supreme Court, which upheld the original decision and ordered the captain of the vessel to pay the fine.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From St. John

To London.—Hoerda, I.C. Transports, Ltd., March 5; Sicilian, Canadian Pacific Steamships, Ltd., March 6; Canadian Conqueror, Canadian Government Merchant Marine, Ltd., March 7; Bolingbroke, Canadian Pacific Steamships, Ltd., March 14; Lord Dufferin, I.C. Transports, Ltd., March 20; Brecon, Canadian Pacific Steamships, Ltd., March 22.

To London (via Halifax).—Comino, Furness Line, March 20; Lexington, Furness Line, March 31.

To Manchester (via Halifax).—Manchester Division, Manchester Line, March 17; Manchester Brigade, Manchester Line, March 31.

To Liverpool.—Montcalm, Canadian Pacific Steamships, Ltd., March 9; Montrose, Canadian Pacific Steamships, Ltd., March 16; Montclare, Canadian Pacific Steamships, Ltd., March 23.

To Glasgow.—Concordia, Cunard-Anchor-Donaldson Line, March 14; Marburn, Canadian Pacific Steamships, Ltd., March 17.

To Hull (via Halifax).—Comino, Furness Line, March 20; Lexington, Furness Line, March 31.

To Southampton.—Melita, Canadian Pacific Steamships, Ltd., March 17.

To Belfast, Londonderry and Cork.—Melmore Head, Head Line, March 4; Ramore Head, Head Line, March 15.

To Dublin, Londonderry and Cork.—Melmore Head, Head Line, March 4; Lord Antrim, Head Line, March 11.

To Avonmouth.—Concordia, Cunard-Anchor-Donaldson Line, March 14.

To Antwerp.—*Melita*, Canadian Pacific Steamships, Ltd., March 17; Brecon, Canadian Pacific Steamships, Ltd., March 22.

To Rotterdam.—Hoerda, I.C. Transports, Ltd., March 5; Rathlin Head, Head Line, March 18; Lord Dufferin, I.C. Transports, Ltd., March 20.

To Havana.—A steamer, Nagle & Wigmore, March 15.

To Bermuda, Barbados, Trinidad and Demerara.—Berwyn, Canadian Pacific Steamships, Ltd., March 20.

To Hamburg.—Melita, Canadian Pacific Steamships, Ltd., March 17; Rathlin Head, Head Line, March 18.

To Havre and Hamburg.—Essex County, I.C. Transports, Ltd., March 11; Welland County, I.C. Transports, Ltd., March 24.

To Bordeaux and Dunkirk.—Grey County, I.C. Transports, Ltd., March 20.

To Australia and New Zealand.—Tredennick, New Zealand Shipping Co., Ltd., March 21.

To South Africa.—Jekri, Elder, Dempster & Co., March 31.

To Rio de Janeiro, Santos, Montevideo and Buenos Aires.—Harmodius, Houston Line, March 15.

From Halifax

To Liverpool and Queenstown.—Andania, Cunard-Anchor-Donaldson Line, March 19; Megantic, White Star-Dominion Line, March 23; Regina, White Star-Dominion Line, April 2.

To Plymouth, Cherbourg, and London.—Antonia, Cunard-Anchor-Donaldson Line, March 9.

To Bermuda, British West Indies, and British Guiana.—Royal Mail Steam Packet Co., March 16, and every fortnight thereafter.

To Barbados, Trinidad and Demerara (British Guiana).—Canadian Harvester, Canadian Government Merchant Marine, Ltd., March 10.

To Australia and New Zealand.—Canadian Explorer, Canadian Government Merchant Marine, Ltd., March 20.

From North Sydney

To St. John's (Nfld.).—Kyle, Reid-Newfoundland Co., Tuesday, Thursday and Saturday every week; Sable I., Farquhar Steamship Co., March 6; Belvernon, Tri-National SS. Corporation, March 15 and 26.

From Vancouver

To Yokohama, Kobe, Moji, Shanghai, Manila and Hong Kong.—Hawaii Maru, Osaka Shosen Kaisha, April 4.

To Yokohama, Kobe, Nagasaki, Shanghai, Manila and Hong Kong.—Empress of Russia, Canadian Pacific Steamships, Ltd., March 22.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Canada, Canadian Pacific Steamships, Ltd., March 8.

To Yokohama and Kobe.—Toyooka Maru, Nippon Yusen Kaisha, March 18; Toyawa Maru, Nippon Yusen Kaisha, April 4.

To Yokohama, Kobe, Hong Kong and Manila.—Protesilaus, Blue Funnel Line, March 10.

To Yokohama, Kobe, Moji, Shanghai and Hong Kong.—Africa Maru, Osaka Shosen Kaisha, March 20.

To Dairen (Manchuria).—Africa Maru, Osaka Shosen Kaisha, March 20; Hawaii Maru, Osaka Shosen Kaisha, April 4.

To Honolulu, Suva, Auckland, and Sydney.—Niagara, Canadian-Australasian Royal Mail Line, March 30.

To Shanghai, Manila, Hong Kong and Singapore.—Harold Dollar, Canadian Robert Dollar Co., March 25.

To the Orient.—Canadian Highlander, Canadian Government Merchant Marine, Ltd., March 15.

To Australian Ports.—Canadian Importer, Canadian Government Merchant Marine, Ltd., March 6.

To Wellington, Lyttleton, Dunedin, Melbourne and Sydney.—Wairuna, Canadian-Australasian Royal Mail Line, March 22.

To Manchester.—Craster Hall, Isthmian Line, March 14.

To Bordeaux, Havre, Antwerp, Santander (Spain) and London.—Nevada, Compagnie Générale Transatlantique, March 20.

From Victoria

To Yokohama, Kobe, Shanghai, Manila and Hong Kong.—President Jackson, Admiral Oriental Line, March 15; President Jefferson, Admiral Oriental Line, March 27.

To Yokohama and Kobe.—Kaga Maru, Nippon Yusen Kaisha, March 22.

SPANISH BUSINESS CONDITIONS

Since the turn of the year there has been a slackening in business in Spain writes the Barcelona correspondent of the London *Times Trade Supplement*. There is a decided tightness of money which renders collections by no means satisfactory. Less business is being placed with the local textile mills, which, however, in most cases have considerable orders yet unfulfilled. The manufacturers look upon the lull in business as only temporary, but are faced with continually rising factory costs.

The slump in the wine trade continues with damaging effect on the buying powers of those interested in the industry. Each fall of the mark has been severely felt in Spain, where it is believed that the holdings are prodigious.

The boot and shoe trade is slack, largely due to the policy of the manufacturers in raising price unduly. The Spaniard favours firstly appearance, secondly, cheapness and durability, and as he finds his first requirement in the imported article at a slight increase of cost over the local make, the Spanish boot and shoe manufacturers are suffering. The shops are exhibiting larger quantities of British and American goods than for a long time past. The American styles and shapes are popular, but the British are preferred for durability and strength.

The great safeguard to the manufacturing industry is the fact that, Spanish orders being proverbially small, there are few cases of overstocking by retailers. Consequently an early revival is confidently anticipated.

LIST OF ACTS ADMINISTERED AND PUBLICATIONS ISSUED BY THE DEPARTMENT OF TRADE AND COMMERCE

Copyrights Act (a). Cullers Act. Electricity and Fluid Exportation Act (b). Electricity Inspection Act (b). Electric Units Act (b). Gas Inspection Act (b). Gold and Silver Marking Act. Grain Act. Inspection and Sale Act. Inspection of Water Meters Act (d). Lead Bounties Act. Patent Act (a). Petroleum Bounty Act. Statistics Act (c). Trade Mark and Design Act (a). Timber Marking Act (a). Weights and Measures Inspection Act (d). Zinc Bounties Act.

MISCELLANEOUS

Annual Report of the Department of Trade and Commerce.
Annual Report of Board of Grain Commissioners for Canada.
Annual Report *re* Mail Subsidies and Steamship Subvention.
List of Licensed Elevators, etc.
Patent Office Record (Weekly) (a).
Annual Report of Weights and Measures, Electricity and Gas (d).
Dominion Grain Research Laboratory (1920).
Grain Inspection in Canada (1914).
Rules and Forms of the Canadian Patent Office (a).
Rules and Regulations made by the Board of Grain Commissioners.
Trial Shipments of Wheat from Vancouver via the Panama Canal to the United Kingdom (1918). (Out of print).

PUBLICATIONS OF THE COMMERCIAL INTELLIGENCE SERVICE (e).

Commercial Intelligence Journal, containing Reports of Trade Commissioners and other Commercial Information.
Apple Market Conditions: Reports from the Canadian Fruit Trade Commissioner at Liverpool (periodically).
Canada-West Indies Conference (1920).
Canadian Economic Commission to Siberia (1919).
Fruit Production in Australia (1922).
German War and Its Relation to Canadian Trade (1914).
Indian Empire as a Market for Canadian Products (1922). (Price outside Canada, 35 cents.)
Mexico as a Field for Exports (1921). (Price outside Canada, 35 cents.)
Markets of Jamaica and the Republic of Colombia, Venezuela, and Panama (1922). (Price outside Canada, 35 cents).
Packing for Overseas Markets (1922). (Price outside Canada, 35 cents.)
Report of Special Trade Commission to Great Britain, France and Italy. (French and English) (1916).
Russian Trade (1916).
Tariffs of the British West Indies (in leaflets).
Trade after the War (1916).
Timber Import Trade of Australia (1917).
Trade between Canada and the British West India Colonies (1920).
Trade of the New Countries of South-east Europe (1921). (Price outside Canada, 35 cents.)
Trading Opportunities in Scandinavia (1922). (Price outside Canada, 35 cents.)
Trading with Egypt (1921). (Price outside Canada, 35 cents.)
Trade with Greece (1921).
Trade with South China (1918).
Trading with Spain (1920).
Trading with Switzerland (1922). (Price outside Canada, 35 cents.)
Toy Making in Canada (1916).
West Africa and Its Opportunities for Canadian Trade (1921). (Price outside Canada, 35 cents.)

PUBLICATIONS OF THE BUREAU OF STATISTICS

The following is an abbreviated list of publications of the Bureau of Statistics. For a complete list, see note (c).
Census of Canada (1911). VI Vols., Bulletins, etc.
Census of Prairie Provinces (1916).
Miscellaneous Statistics respecting the following: Criminal; Education; Finance (Provincial and Municipal); Transportation, including railways and tramways, express, telegraphs, telephones, water, etc.; Production, including agriculture, furs, fisheries, forestry, mining and manufactures; Vital (annual and monthly).
Year Book of Canada.
Report of the Dominion Statistician, Annual.
Trade of Canada (Imports and Exports), Annual and Monthly.
Trade (Internal), including grain, livestock, coal, prices, etc.

NOTE.—(a) Applications should be addressed to: Commissioner of Patents, Ottawa. (b) Applications should be addressed to Director Gas and Electricity Inspection Service, Ottawa. (c) Applications should be addressed to: Dominion Statistician, Ottawa. (d) Applications should be addressed to: Director Weights and Measures Service, Ottawa. (e) Applications should be addressed to the Director, Commercial Intelligence Service, Ottawa.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 285 Beaver Hall Hill, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic.

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address, Canadian.*

Australia.

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium.

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil.

Major E. L. McColl. Address for letters—Caixa (P.O. Box) 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies.

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China.

J. W. Ross, Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba.

Address: 400 and 401 Teniente Rey 11, Havana. (Post-office Box 1290.) *Cable Address, Cantracom.*

France.

Lieut-Col. Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany.

L. D. Wilgress, Care British Consulate-General, Hamburg. (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland.

Norman D. Johnston, Zuidblaak 26, Rotterdam. *Cable Address, Watermill.*

India and Ceylon.

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy.

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica.

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan.

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico.

C. Noel Wilde. Address for letters, Apartado Num. 126 bis, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian.*

New Zealand.

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa.

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements.

P. W. Ward, P.O. Box 121, Singapore. (Territory covers Straits Settlements, British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

A. B. Muddiman, Sun Building, Clare Street, Bristol. *Cable Address, Canadian.*

Major Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States.

Frederic Hudd, 44 Whitehall Street, New York City. *Cable Address, Cantracom.*

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Australia.

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark.

C. E. Sontum, Grubbegd, No. 4, Christiania, Norway. ***Cable Address, Sontums.***

British West Indies.

R. H. Curry, Nassau, Bahamas.

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DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

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378

TABLE OF CONTENTS

Commercial Intelligence Journal

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Ottawa **March 10, 1923** **No. 997**

TRADE COMMISSIONER P. W. WARD'S ITINERARY IN CANADA

The itinerary arranged for Mr. P. W. Ward, Canadian Trade Commissioner in Singapore, for his business tour throughout the Dominion, as formerly announced in the *Commercial Intelligence Journal*, was interrupted by his participation in the Extension Courses in Export Trade held at the University of Toronto, McGill University, and l'Ecole des Hautes Etudes Commerciales, Montreal. The rearranged itinerary is as follows:—

Brantford	March 12.
Hamilton	March 13.
Galt	March 15.
Kitchener	March 16.
Welland, Bridgeburg, Thorold and Niagara Falls	March 19 and 20.
Guelph	March 21.
Stratford	March 23.
London	March 26.
Chatham	March 27.
Border Cities	March 28 and 30.
Toronto	April 2.
Oshawa	April 3.
Montreal	April 4 and 5.
Sherbrooke	April 6.
Three Rivers	April 9.

Firms in Toronto and Montreal who desire to be brought in touch with Mr. Ward, or to interview him, should direct their communications to him, care of Canadian Manufacturers Association, or the Secretary of the Board of Trade, in these cities, and in the case of Hamilton to the care of the Secretary of the Chamber of Commerce in that city. In all other cities and towns included in the itinerary, requests for interviews should be addressed to the Secretary of the local Chamber of Commerce or Board of Trade.

FINANCIAL AND BUSINESS CONDITIONS IN AUSTRALIA

Mr. D. H. Ross, Canadian Trade Commissioner in Melbourne, Australia, sends under date March 5, 1923, the following cablegram descriptive of financial and business conditions in Australia:—

"The Commonwealth revenue continues to exceed the estimates of the Customs receipts, for eight months ending February aggregating £22,172,000 sterling, an increase of £4,354,000 sterling over corresponding period in fiscal year 1921-22. This month has opened with a stronger volume of orders than was anticipated, and wholesale hardware and grocery distributors report that remunerative realization of primary products such as wool, butter, and wheat has greatly increased the purchasing power in country districts, which is reflected in the placing of orders freely in oversea countries. Through unfavourable seasonal conditions, the summer trade has been disappointing to distributors of dry goods and wholesale warehouses are now carrying immense stocks. The wool-selling season in Australia has almost reached its apex, and it is estimated that now there is only about half million bales of the 1922-23 clip for disposal, half of which is held in the State of Victoria. Owing to the protracted drought conditions over a great area of the Commonwealth, the lambing season in many parts will probably be a failure, hence the outlook is for an advance in prices for 1923-24 on all classes of wool. The wheat and flour market is depressed; flour nominally £10 2s. 6d. per ton, wheat about 5s. 3d. per bushel free aboard."

THE MARKET FOR RUBBER MANUFACTURES IN SCOTLAND AND IRELAND

TRADE COMMISSIONER GORDON B. JOHNSON

Glasgow, February 9, 1923.—While this report will necessarily be mainly concerned with this market for manufactured goods of rubber, it may be of some interest to touch on the subject of raw rubber and the rubber growers, and to recall some of the events of comparatively recent history leading up to the abnormally low prices of raw rubber prevailing in the middle of 1922.

BEGINNINGS OF PLANTATION RUBBER

Up to a very few years ago most of the rubber came from Brazil, and the best, known as Para, came from the Amazon valley, and was the product of a tree which flourished in the dense tropical forests of that mysterious region. With the constantly increasing uses for rubber, it occurred to a certain Englishman that this valuable tree could be cultivated, and that the Eastern Tropics would prove particularly suitable for its adoption. Accordingly, after much difficulty, he procured a quantity of the seeds, and they were eventually planted at Kew Gardens in London. A few germinated, and the young plants were taken to Ceylon and to the Malay Peninsula, where, in the former country, they grew to fine trees in the Peradeniya Gardens. The Ceylon tea planters, recognizing the value of this new opportunity, planted young rubber trees in their tea gardens between the tea bushes, and the results both there and in the Malay Peninsula and also the Dutch East Indies were so successful that today nine-tenths of the world's production of raw rubber is derived from the plantations. The only rubber still produced in any quantity from the trees growing wild in the forest is Para, which is still preferred for certain purposes, but which gives results in manufacture very similar to plantation rubber. The transfer of the great bulk of the raw rubber industry from natural conditions in Brazil to artificial and comparatively cheap production on the other side of the world had a parlous effect on the economic condition of the Amazonias, that huge territory in Northern Brazil, whose former great prosperity was built up on rubber.

Meanwhile in the East great activity prevailed. The necessary seven or eight years had elapsed to prove that the trees would not only grow, but also yield rubber, and the demand for it due to the rapid rise of the rubber tire industry, combined to create great interest, the formation of numerous companies and the planting of great areas. The writer remembers very vividly, while he was living in Ceylon in 1905, the feverish formation of rubber companies, and the spectacular rise of shares, which culminated five years later in the great rubber boom in England, during which shares of rubber companies, good and worthless, rose to fantastic heights. In the Far East at the same time the excitement was just as great. In Shanghai in 1908 and later, in the writer's recollection, numerous companies were formed for development of rubber plantations in the Straits and Malay Peninsula, and the same feverish speculation was in evidence as in London. When the crash came hundreds of wealthy Chinese and foreign merchants in Shanghai were ruined. There was nothing very wrong with the industry, but only with the gambling in shares. Altogether about £100,000,000 of British capital is invested in the rubber-growing industry.

The highest price reached for raw rubber was at the period of the great boom in shares, and the highest point touched was 12s. per pound in April,

1910. The lowest price was in August last, when it fell to 6¾d. per pound, or about 13 cents. Over-production of course was the cause of this great slump, the low price above quoted having no relation to costs of production. The year 1922 proved to be the bottom of the slump, and therefore the turning point in the fortunes of the industry. A natural restriction of supply caused by low prices, and the campaign to increase the uses of rubber, resulted in a change for the better, and the price advanced until in January it had reached the 1s. 3d. level.

ARTIFICIAL RESTRICTION

In June last the Colonial Office Committee, which had been appointed to investigate the situation, which was so serious that the majority of the estates were being worked at a loss, presented it report, recommending certain measures of restriction of supply, with the reservation that it must be applied to all countries producing plantation rubber in order to be effective. While British countries are the biggest producers, the Dutch East Indies supply enough to have nullified the effect of any such scheme unless they fell in with it; or rather they would benefit from such a scheme at the expense of British planters. The expanding character of the demand, however, principally from the United States, and the rise of the market, encouraged the committee to abandon its earlier reservation respecting non-British countries, and it pushed on with its restriction scheme, which aimed at a reduction of output by means of a graded series of export duties applied to British colonies. This scheme was accepted by the colonial governments concerned and came into operation in November last.

The interests of the rubber growers are cared for by the Rubber Growers' Association in London, and the Propaganda Department of that Association is doing good work, principally in the field of encouraging new uses for rubber, and extending interest in rubber goods by advertisment and otherwise among the public. One of the most hopeful developments of the year has been the discovery that rubber in the form of liquid latex can be employed in the manufacture of paper.

RUBBER ROADWAYS

An offshoot or affiliation of the Rubber Growers' Association is a company known as Rubber Roadways Limited, and its purpose at the present time is to experiment with various forms and structures of rubber with a view to its adoption as roadway paving in London and elsewhere. It is obvious that any extensive use of rubber for this purpose would enormously increase the consumption. The present writer saw two years ago in London a stretch of roadway, which probably bears the heaviest traffic in the metropolis, being laid with rubber blocks as an experiment by this company. The road was the Borough High Street, which is the prolongation, on the south side, of London Bridge. In appearance, after laying, the roadway presented a very similar condition to that of the usual type in London, wooden blocks on concrete. The rubber blocks consist of a base of expanded metal (which is a common type of steel reinforcement for concrete, and is merely a mesh of twisted steel) upon which is placed a layer of vulcanite and on to this is vulcanized a surface layer of softer rubber. The whole block is secured to the concrete sub-surface by two steel prongs extending into holes in the concrete, and grouted in. This system is very expensive not only to manufacture, but also to lay, and is in addition not very satisfactory, as under heavy traffic such as steam traction engines and steam lorries (which are very prevalent in Great Britain) and motor lorries, the steel backing breaks away from the concrete sub-surface, and the vulcanite does not adhere very perfectly to the steel.

Another interesting experiment is being carried out, also in London, in Little St. Andrew Street, where it joins St. Martin's Lane. The rubber paving blocks, which are being laid by the Holborn Borough Council, are made of a special hard rubber composition, and are provided with ribs on each side for the purpose of interlocking, the joint being made with bitumen. This particular stretch will have almost as severe a test as that in the Borough High Street, as it was found that over 400 vehicles an hour pass through the street.

It is not difficult to imagine that large stretches of London's roadways will be rubber-paved in the future if these or other experiments prove economical and satisfactory. The same remark applies to railway station platforms, one of which so covered may be seen at Euston Station. It might be thought that rubber in thick sheets might be laid directly on to a smooth surface of concrete for a satisfactory rubber-covered roadway. The trouble with that appears to be that no satisfactory method of uniting the rubber and concrete has yet been evolved, and the rubber sheets tend to creep and to turn up at the edges. Anyone who could invent a method to overcome these defects would make a fortune.

Rubber Tires

PNEUMATICS

The keynote of the rubber trade in Great Britain is the fierce competition, not only between British manufacturers themselves, but also between the home product and the imported article. Nearly 4½ million pounds sterling worth of pneumatic tires, tubes and solids were sent to this country last year from various sources, mainly American and French. The actual figures for the past three years were £5,577,000 in 1920, £4,086,000 in 1921 and £4,241,000 in 1922. Owing to the decline in prices in the past two years, the above value for 1922 represents over a million more tires and tubes imported in that year than in 1920. On the other hand, the values of the exports from British factories in these three years were £6,471,000, £2,051,000 and £2,047,000 respectively, showing that in the last two years the imports of tires and tubes have exceeded exports by over £2,000,000 a year.

These imports of course represent a very large proportion of the total consumption in Great Britain. They are, in fact, such a large share of the trade that there is not enough business left to keep employed the 65,000 men in the British industry and help its £30,000,000 capital to pay a reasonable dividend.

While the world has become impatient with the excuse that the war caused this or that unpleasant consequence, it is certainly true that the tire industry worked to its utmost capacity on government orders for war purposes, like so many other industries, and with no stocks available for the public, left a very wide loophole for the foreign tire representative, which he naturally took advantage of to supply the requirements of the public in the only way they could be met. The result was that a fashion arose among car owners for American and other imported tires, and this, combined with the fact that research in the British industry had stood still owing to manufacturing concentration for war necessities, which was not the case in the United States, and which resulted among other things in the cord tire, provided difficulties for the home manufacturer from which he has at last emerged remarkably well. It is the case that the fabric tire is now more or less of a back-number in this country both with the public and with the manufacturer, and cords almost hold the field. Many makes of British cord tires are superb productions. The straight-side pneumatics are not so popular in this country as the beaded-edge, particularly as the latter are now made of unusual thickness and strength

at the section of the wall just inside the bead, formerly their weakest point. At the annual motor show at the Kelvin Hall, Glasgow, which closed a few days ago, and which is acknowledged to be as comprehensive as, and in no way inferior to, the yearly show at Olympia in London, or anyhere else, many of the tire manufacturers were fully represented, including at least three Canadian firms of United States parentage. The exhibit of a certain well-known British tire manufacturer was particularly interesting, showing in detail as it did the actual method on model machines of the manufacture of their twisted and rubber-insulated multiple thread cord as applied to their cord tires. Each cord consists of 24 threads made up of four groups of six threads each, the six threads being twisted and insulated to form one group, and the four groups similarly treated to form the cord. The cord is then flattened and is incorporated into the casing in two layers, the cords of one layer of course crossing those of the other layer at an angle. For fairly heavy tires this method of construction seems to render the tire remarkably free from internal friction, which is of course the fatal defect of the fabric tire, and which the cord tire was designed to reduce.

Red inner tubes are most popular in this country, but grey tubes have commanded a certain favour. The prejudice against grey appears to be purely psychological.

The sizes which are most in demand in Great Britain, with the retail prices which are prevalent, are as follows:

815 mm. x 105 mm.	£5 3 6
820 x 120	6 10 6
710 x 90	3 7 6
700 x 80	2 17 9
760 x 90	3 19 0
32-inch x 4½-inch	7 16 9
32 x 3½	5 5 0
32 x 4	6 6 9

Tires for Ford cars of the following sizes are also in good demand:

30 x 3½	£4 10 6	Straight side, cord
30 x 3	2 8 0	Beaded edge, fabric

There is a growing demand for "giant" cord tires for rear wheels of trucks as well as for front wheels, of the following sizes:

34 x 5	....
36 x 6	£15 19 3
38 x 7	20 5 6
40 x 8	31 15 6

There is a spread of about 15 per cent or 20 per cent between manufacturers' prices and what the public has to pay.

SOLID BAND TIRES

The number of commercial motor vehicles on the road in Great Britain in proportion to the total motor traffic is probably much higher than in either Canada or the United States, and moreover a much greater proportion of such vehicles is provided with solid tires than with pneumatic, particularly the heavier varieties. The solid tire therefore is a much more important factor in the tire world here than it is across the Atlantic. Many makes of numerous manufacturers are on the market, but the attempt to produce a tire of this kind which will provide a reasonable degree of resilience together with capacity to stand the load has yet to be successful. The tires built to stand heavy loads without early dissolution are so lacking in resilience that the vehicle, the engine, and the passengers suffer damage or discomfort from the jolting caused when-

ever any speed is applied. The application of pneumatics to such heavy loads has not reached the point it has done in the United States, but whether this is on account of high first cost or less satisfactory results with pneumatics has not transpired.

PROSPECTS OF EXPANSION

There can be little doubt that the motor traffic of the country, both commercial and private, will steadily, and very likely rapidly, expand. The excellent system of good roads in all directions, with the endless number of interesting places amidst charming scenery which appeal to all, and the striking variety of really splendid cars at fairly low prices within the reach of people of only moderate means, seem bound to increase the circle of owners from year to year. The demand for tires will further increase as, and if, prices of cars go down.

DISTRIBUTION

The methods of tire distribution are by branch organizations in all the principal cities, both for the product of the British manufacturer and the imported article, and this is supported by extensive advertising. Similar methods would have to be adopted by any Canadian tire manufacturers seeking business in this country, and in fact are adopted by such manufacturers in Canada as are doing business here.

Rubber Footwear

PLIMSOLLS OR " SAND " SHOES

There is always a large business to be done in this class of cheap footwear consisting of canvas uppers and hard rubber soles, used largely by children at the seaside—hence the name " sand " shoes. It is generally agreed that transatlantic manufacturers cannot compete in this class of footwear, because of price, particularly in Scotland, where the rubber footwear industry principally exists.

TENNIS SHOES

There is a very large market in this country for the class of rubber footwear called tennis shoes. In the variety with canvas uppers and thin flexible soles, of similar appearance to the " plimsoll " but of better quality and style, the Canadian and American product holds the field. In this class of footwear the British manufacturer is increasingly unable to compete because of the superior quality of the imported article. The hard, inflexible sole of the British manufacturer is no longer much wanted, even at a cheaper price, and sales are declining.

While the above style of tennis shoe is so described in Canada, and is almost universally worn for that purpose there, a " tennis " shoe in Great Britain is usually a more expensive article of buckskin, brown leather or canvas uppers, soled with rubber of about $\frac{1}{4}$-inch in thickness. In this field the British manufacturer is and has long been supreme. The typical shoe for tennis purposes is now, however, faced with a competitor which newly appeared last year and is coming into rapid favour. That is a shoe soled with crepe rubber. It is stated to wear about two or three times as long as the sole of vulcanized rubber. An unsatisfactory feature of this new shoes is that the crepe sole often breaks away at the toe and heel, but this defect is being overcome by stitching on a thin inner sole of crepe and cementing to it with an especially strong solution an outer wearing sole of crepe. If all that is claimed for it is

true, this new and cheaper shoe should largely take the place of the former aristocrat of the tennis world, particularly as hard courts have almost entirely displaced grass courts, not only in this country but even more so in other parts of the world, resulting in harder wear for shoe soles.

The price of children's sand shoes to the retailer at present is 1s. 5d. per pair (34 cents). Women's sand shoes, also wholesale, are from 1s. 10d. to 2s. 2d. (44 cents to 52 cents).

For tennis shoes of the flexible thin rubber sole, canvas upper, of the plimsoll type, prices to the retailer of a well-known United States make are as follows:—

Men's sizes 6 to 10	4s. 11½d.	($1.19)
Women's sizes 3 to 7	4s. 4d.	($1.04)
Children's sizes 4 to 10	3s. 3d.	($0.78)

RUBBERS, OVERSHOES, WELLINGTONS

Rubbers (goloshes or overshoes) in this country are conspicuous by their absence. They are rarely worn except when there is snow or slush on the ground, and even then by not more than probably 20 per cent of the people. There are several reasons for this apparently. The excellent quality generally of the leather footwear, which is fairly damp-proof, the tendency to look upon the wearing of rubbers as more or less of an effeminate habit of transatlantic peculiarity (of the wrapped-in-wool variety) not to be encouraged among a hardy outdoor people, and the discomfort occasioned by this cramping article —all these reasons no doubt contribute to the poor reception in this country of the "rubber." They are mostly used by children, and in Glasgow at any rate have been to a considerable extent discarded in favour of the Wellington rubber boot. The demand this year for both, however, has fallen off because of the unusually mild winter and complete absence of snow. Wellingtons are shipped to this country by the Hood people, but the British manufacturer scores against the imported by reason of price. The demand for overshoes (snowboots) is apparently a very small one.

HEELS AND SOLES

The wearing of rubber heels and soles received a great impetus during the war when a large proportion of officers of the Army took to wearing a well-known make which forced itself into prominent use by advertisement. The habit extended to civil life, although the thick military soles have given place to thinner, more flexible, and less conspicuous ones. Rubber soles and heels together are in much greater use here than in the United States or Canada (which in these matters follow the same fashions), although heels alone are almost universally worn in North America, and are much less used here. A certain make of rubber heel of a concave shape is taking firm hold here, although what advantage it possesses over any other make is not easily discerned. It is nailed on like the rest, but because of its suction quality, requires no solution to adhere.

As regards rubber footwear in general, it may be stated in conclusion that competition is keen between the Scottish manufacturer, the American and Canadian for business throughout Great Britain. The centre of the rubber footwear industry in Britain is Edinburgh.

Canadian manufacturers contemplating business in this country, if they do not establish their own organization, must have an agent. Stocks must be kept in the country, at any rate when a footing is obtained, enabling customers to get what they want in all sizes at all times. The factors or importers must be given

quotations in sterling delivered to warehouse here, or at least c.i.f. It is difficult to understand the reluctance of certain Canadian manufacturers to meet the custom of the trade, *and the necessities of the case*, in this market. It is not uncommon for a Canadian export manager to say that his company does business in South Africa, or Australia or elsewhere, in dollar quotations, f.o.b., and so on, and his company cannot depart from its export practice in order to get business in Great Britain. On the assumption that business here is really desired, it is an incomprehensible attitude.

Exporting manufactured goods to South Africa or Australia is entirely different from exporting similar goods to the United Kingdom. This market is entirely different from those two, or any other, countries. In those countries, Canadian manufacturers are competing against *imported* goods only, where the manufacturers are all on equal terms. In this country they compete against both imported and *home* manufactures, and factors and retail merchants have no inducement to buy imported stocks if the way is not made as easy for them as if they were purchasing the home-manufactured product.

Rubber Floor Coverings

Rubber floor coverings to take the place of carpets or linoleum are now manufactured in Great Britain, and are being increasingly used, particularly for public buildings, offices, theatres, hospitals, etc., and to some extent in private houses as well, for kitchens, halls, bathrooms and bedrooms. This product of one company is sold in rolls of 100 feet and from 36 inches to 48 inches wide, and $\frac{1}{8}$- or $\frac{3}{16}$-inch thick. It is claimed to be odourless, hygienic, and almost everlasting, with the softness and solidity of carpet, with the cleanliness of the polished floor. Although extremely flexible it does not curl. It is made in attractive colourings, which are retained unimpaired throughout wear; their shades are not merely surface shades—their colour is part of their make-up from one side through to the other. The most popular colours are marbled effects and a heather mixture. The price of the $\frac{1}{8}$-inch flooring is 12s. 6d. per square yard retail.

Rubber Garments

Rubber-coated rain coats in this country are mostly used by children. Grown-ups prefer for this purpose a garment which has been waterproofed by chemical treatment. There is a large business done, however, in rubber-coated suits for motor cyclists (of whom there are vast numbers in this country), rain-proof headgear, yachting and shooting coats, etc. One of the latest developments of rubber in the direction of wearing apparel on a considerable scale is its use in millinery. The unreliable British weather has encouraged the production of attractive little hats with a complete range of shades of rubber or rubberized material.

The opportunities for importations of waterproofed wearing apparel are, however, negligible, as the British makers are without serious rivals in this industry.

Mechanical Rubber Goods

While in some branches of the rubber manufacturing industry the British maker is supreme and has no serious rivals in regard to quality, the various kinds of mechanical rubber goods, such as hose-pipes, belting, shock-absorbers, packing, washers, etc., and for insulation purposes in the electrical industry, have been imported in the past to some extent from the United States. Such import trade was, however, killed by the exchange and by slow deliveries, and the American manufacturers have not yet got it back. In these lines the opportunities in this market are mainly dependent on prices. Rubber driving

belting is not so much in vogue in this country as formerly, except where the drive is wet, balata having largely taken its place. Rubber conveyor belting is used largely in coal mines, granite quarries, and for grain conveying, but in the quarries it gets rapidly cut up.

The business in mechanical rubber goods is done through factors who buy from the manufacturers and sell to the mills, engineering works and shipyards and factories, and the existence of the factors is justified by their experience of the best manufacturers to go to for particular requirements, and the advice they are able to give from their technical knowledge. To obtain business in mechanical rubber goods in Britain, Canadian manufacturers would have not only to prove to the factors concerned the quality of their goods at competitive landed prices, but make it as easy as possible for the factors to obtain their requirements without delay.

Rubber in the Medical Profession

The many uses to which rubber is put in the medical profession as rubber gloves, sheets, hot water bottles, tubing, anæsthetic apparatus, ebonite fittings, etc., suggest a field for further exploitation. In the case of rubber gloves it is understood that one enterprising Canadian company has done some useful business in this country.

Rubber in the Home

In the kitchen, rubber nowadays is used in many forms, as in the squeegee for drying wet floors, tesselated halls and tiled garden walks; the force cup, the useful little appliance which clears out choked waste pipes; the gas ring connection; anti-splash tap nozzles; wringer roller covers; sink plugs; bottle rings and stoppers.

In the bathroom rubber sponges, sponge bags, and bath mats are in common use, and in other parts of the house stair treads, door mats, rubber wedges for noisy windows, door stops and buffers and door springs.

In the world of sport rubber enters into the manufacture of golf balls, grips for golf clubs and tennis racquets, rubber tees, rubber shin-guards for cricket.

Ebonite or vulcanite for combs, buttons and pipe mouth-pieces are of course used in enormous quantity.

To sum up, it would seem that opportunities in this market for Canadian producers of rubber manufactured articles will be mainly in the field of pneumatic tires, in regard to which branch houses carrying large stocks, and extensive advertising, are essential; in the rubber footwear industry in those qualities in which transatlantic makers already have the advantage in quality and style; in specialties like rubber gloves; and in miscellaneous articles in regard to which expensive selling organizations or advertising propaganda are not required.

Import Statistics

Imports into the United Kingdom of Rubber Manufactures for the past Three Years

	1920		1921		1922	
Rubber Tires and Tubes—	Quantity	Value	Quantity	Value	Quantity	Value
Number..	2,240,583	£5,577,061	1,553,668	£4,086,078	3,412,873	£4,241,847
Rubber Boots and Shoes—						
Doz. Prs..	280,481	714,685	62,600	158,985	112,308	237,924

N.B.—The above figures are the only ones yet available for 1922.

[A detailed statement of imports into the United Kingdom of rubber manufactures for the years 1920 and 1921, with values, was published in *Commercial Intelligence Journal* No. 989 (January 13, 1923, page 43.)]

TRADE CONDITIONS IN THE UNITED KINGDOM

Trade Commissioner Harrison Watson

London, February 15, 1923.—Once more progress towards the restoration of stability in European trade has been interrupted, this time by the occupation of the Ruhr district. No man can foretell the outcome of this adventure. While a distinct fillip has been given to the British coal and iron and steel industries owing to the unforeseen curtailment of activity in this hive of German industry, one result has been to set the Continental exchanges wobbling again and to disorganize foreign markets generally. The other important feature of January was the provisional arrangement entered into for the adjustment of this country's debt to the United States. If this is finally adopted, it will, although placing a heavy burden on the shoulders of Great Britain, certainly be advantageous in every other direction.

January is the month when the annual meetings of the five great chartered banks are held, and the chairmen of these great institutions, as well as other acknowledged financial and economic authorities, pronounce their verdicts upon the financial and commercial position and prospects. Upon the present occasion, it is generally recognized that some improvement in trade has taken place and that the outlook is promising. Upon the other hand, there is unanimous agreement that the position on the Continent is still so unsettled that the progress of events in the immediate future is absolutely uncertain, and the restoration of prosperity must be a slow affair.

As regards banking itself, the month witnessed another striking example of the consolidation of interests which has been in progress for some time past in the absorption of the well-known military banking establishment of Cox & Co. by Lloyds', one of the chartered banks, and this morning it is announced that another army firm of bankers, Holt & Co., is amalgamating with Glyn, Mills, Currie & Co., which now remains one of the only private banks of importance in London.

Activity in the home market continues to increase slowly, and, as already mentioned, in certain branches of industry, like the iron, steel, and associated trades, the disappearance of competition from abroad has not only created a home demand but is causing many inquiries from overseas, and prices of most lines are advancing steadily. The improvement in Indian exchange is also bringing about a much better state of affairs in the cotton industry, and similar conditions are being experienced in several other trades. For instance, it was announced at the annual dinner of the Federation of British Music Industries that United Kingdom manufacturers of pianofortes have enjoyed a satisfactory year, which is rather a surprise in view of the almost universal depression in luxury trades. At the same time, other important branches of industry remain quiet or depressed.

According to the official figures just published by the Board of Trade, foreign trade during January exhibited considerably more buoyancy than in the previous month, and there was an increase in imports of £4,788,234, and of £8,055,876 in exports of British goods. Indeed, the figures in both categories are the highest since January, 1921. This is certainly satisfactory, but it remains to be seen whether the expansion will continue, because it is not unusual for variations of this kind to be experienced owing to particular circumstances which are little connected with the main course of trade.

Although a matter of comparatively minor importance, it is not uninteresting to note that during the past month or so the South African peach and plum seem to have secured a permanent position in the barrows from which

the public mainly draws its supplies of fruit, and thus join the established ranks of the apple, banana, and orange. In the past the peach—mainly a hot-house product in this country—has been an article of luxury, the price of which was prohibitive to the masses, but the development of the Cape trade has enabled peaches to be retailed at from six to eight cents each. The interest of this from a Canadian point of view is the possibility of the democratization of the peach leading to a similar opening for the Canadian peach during the summer and autumn, before the African variety comes on to the market.

GREAT BRITAIN ADOPTS CONDENSED MILK STANDARDS

Trade Commissioner Harrison Watson

London, February 16, 1923.—The British Government is gradually following the example of Canada, the United States, and certain other countries, in establishing definite food standards and legislation to cover their importation and sale. Contrary to general impression, up to the present there have never been any special restrictions relative to condensed milk, but the Ministry of Health now announces the adoption of both standards and regulations which are to come into force from the 1st August, 1923. These apply equally to home-made and imported products.

DEFINITIONS AND STANDARDS

The definitions prescribed are:—

"'Condensed milk' means milk or skimmed milk which has been concentrated by the removal of part of its water, whether with or without the addition of sugar, and includes the article commonly known as 'evaporated milk' but does not include the article commonly known as 'dried milk' or 'milk powder.'

"'Skimmed milk' includes separated or machine-skimmed milk."

All condensed milk shall contain not less than the appropriate percentages of milk fat and milk solids as specified in the following table:—

Description of Condensed Milk	Percentage of Milk Fat	Percentage of All Milk Solids, including Fat
Full cream, unsweetened	9.0	31.0
Full cream, sweetened	9.0	31.0
Skimmed, unsweetened	....	20.0
Skimmed, sweetened	....	26.0

LABELLING

The requirements are as follows:—

"1. Every tin or other receptacle containing condensed milk shall bear a label upon which is printed such one of the following declarations as may be applicable or such other declaration substantially to the like effect as may be allowed by the Minister:—

(i) In the case of full cream milk (unsweetened):—

CONDENSED FULL CREAM MILK,
UNSWEETENED.

This tin contains the equivalent of
(*a*) pints of milk.

(ii) In the case of full cream milk (sweetened):—

CONDENSED FULL CREAM MILK, SWEETENED. This tin contains the equivalent of (*a*) pints of milk with added sugar.

(iii) In the case of skimmed milk (unsweetened):—

CONDENSED MACHINE-SKIMMED MILK (or CONDENSED SKIMMED MILK), Unsweetened. UNFIT FOR BABIES. This tin contains the equivalent of (*a*) pints of skimmed milk.

(iv) In the case of skimmed milk (sweetened):—

CONDENSED MACHINE-SKIMMED MILK (or CONDENSED SKIMMED MILK), Sweetened. UNFIT FOR BABIES. This tin contains the equivalent of (*a*) pints of skimmed milk with added sugar.

"2. The declaration shall in each case be completed by inserting at (*a*) the appropriate number in words and figures, e.g. 'one and a half ($1\frac{1}{2}$),' any fraction being expressed as eighths, quarters or a half.

For the purposes of these rules milk means milk which contains not less than 12·4 per cent of milk solids (including not less than 3·6 per cent of milk fat), and skimmed milk means milk which contains not less than 9 per cent of milk solids other than milk fat.

"3. The prescribed declaration shall be printed in dark block type upon a light coloured ground within a surrounding line and no other matter shall be printed within such surrounding line. The type to be used for the last sentence of the declarations set out above shall be not less than one-eighth of an inch in height, and that to be used for the remainder of the said declarations shall be not less than one-quarter of an inch in height.

"4. The label shall in addition bear the name and address of the manufacturer of the condensed milk, and shall be securely affixed to the tin or other receptacle so as to be clearly visible.

"5. If there is attached to the tin or other receptacle a label bearing the name, trade mark, or design representing the brand of the condensed milk, the prescribed declaration shall be printed as part of such label.

"6. There shall not be placed on any tin or other receptacle containing condensed milk:—

"(*a*) any comment on, explanation of, or reference to any words or statement contained in the prescribed declaration; or

"(*b*) any instructions as to dilution which, if followed, would produce a fluid containing less milk fat or less milk solids than in milk or skimmed milk as defined in Rule 2 of this schedule, as the case may require."

According to the order it is forbidden to import, or offer for sale, condensed milk intended for human consumption unless the above provisions in regard to standards and labelling are complied with.

POSSIBLE EFFECTS ON CANADIAN CONDENSED MILK

It is understood that these regulations have been adopted as a result of a very thorough investigation of the industry and trade by expert authorities, agriculturists, manufacturers and traders, and as they are considered to be in the best interests of the country, there is little chance of their being altered.

According to the views of the importers in London who handle the bulk of the Canadian condensed milk which is supplied from Canada, our manufacturers should experience no great difficulty in attaining the level called for in "full cream sweetened," and indeed it is stated that most of the milk coming in already reaches these qualifications. In the case of evaporated milk the position is less satisfactory, because the standards are fixed to suit the milking qualities of the herds of the United Kingdom, the milk of which contains a higher proportion of milk fat than the product of Friesians, Holsteins and similar breeds, which figure so largely among Canadian dairy cattle, and there may be difficulties in attaining these standards without risk of coagulation. This difficulty confronts the evaporated milk of several other countries, and it was found that the leading importers of such milks made strong representations to the Government and committee dealing with the question for a lowering of the standard to a level which approximates our Canadian standards, but so far without success. The authorities contend that the new regulations are framed for the public good and will exclude the numerous low-grade and deficient preserved milks which have been coming into the country in recent years, and for that reason will equally protect Canadian manufacturers of high-quality makes.

MOTOR TRANSPORT DEVELOPMENT IN AFGHANISTAN

Mr. H. A. Chisholm, Canadian Trade Commissioner in Calcutta, writes under date January 24, 1923, that details were published last week in the Afghan newspapers of the articles of agreement entered into by the Government of Afghanistan with the Italo-Afghan Motor Transport Company, which has secured a monopoly for twelve years of passenger, mail and goods traffic on the Peshawar-Kabul road, the connecting link between India and the capital of Afghanistan. Commencing in February of this year, the company undertakes to run each way a weekly service of two goods lorries and two mail and passenger vans. Apparently Italian motor vehicles will be used exclusively on this run. According to the published details, the right of subscription to the shares of this company is confined to Afghan and Italian subjects. This contract would seem to be one of the tangible results achieved by a special Italian Commercial Mission which visited Kabul some few months ago.

DEMONSTRATION OF CONCRETE SLEEPERS FOR INDIAN RAILWAYS

TRADE COMMISSIONER H. A. CHISHOLM

Calcutta, January 24, 1923.—Owing to the considerable market which has developed in recent years for Douglas fir creosoted sleepers in India, interest is attached to a demonstration made a few days ago of a new type of concrete sleeper called the "Stent sleeper," so called from the name of Mr. D. H. Stent, the inventor. The demonstration of this new concrete sleeper near Delhi was witnessed by leading Indian railway engineers and officials. The process of manufacture was exhibited at the Delhi plant of a prominent engineering company, and then a trip was made in a special train over a few miles of the North Western Railway, where the rails had been laid on these sleepers.

This sleeper is officially described as follows: "It consists of two concrete blocks, or pots, joined together by a tie bar, as in cast-iron sleepers. The rail fastening is by means of screw or dog spikes driven into wooden plugs specially treated and compressed and set in the body of the concrete block, whereby it is claimed that the advantages of the wooden sleeper, together with permanency and low first cost, are obtained. Rails of any section, from 70 pounds to 110 pounds, can be laid on the standard concrete sleeper."

That the experimental stage has already been passed is shown by the fact that the North Western Railway have already laid fifty miles of line with this sleeper, and it is said that they contemplate laying another seventy-five miles with the same sleeper. The engineers witnessing the experiments referred to above appear to have been considerably impressed by the strength shown by the sleepers under tests, and by the diminution of noise when the train passed from track laid on ordinary iron sleepers to track laid on the concrete sleepers. If further time and experience prove the economy and efficiency of this new sleeper, the very promising market which has developed for Canadian creosoted Douglas fir sleepers will be seriously impaired. It remains to be seen, however, whether these concrete sleepers will stand several years of wear and tear.

IMPORT OF APPLES INTO THE BRITISH WEST INDIES

TRADE COMMISSIONER E. H. S. FLOOD

Barbados, February 13, 1923.—The imports of fresh fruit into Barbados, Trinidad and British Guiana are valued at about £10,000 annually. One-half of this import consists of bananas, mangoes, oranges and pineapples, which are interchanged among the islands themselves, and the other half consists of apples from Canada and the United States and a small quantity of grapes shipped from the United Kingdom. The apples supplied by Canada and the United States in 1921—the last year for which statistics are available—valued £3,578 out of a total import of fresh fruit for that year amounting to £9,627.

Recent shipments of apples received in Barbados have been from Nova Scotia, and the trade is in the hands of one or two firms in that province. The varieties shipped in the last year or two have been the King and the Stark, both of which seemed to suit buyers and these were exceptionally well packed in barrels and arrived in good condition. The consignees state that recent shipments are finer apples than any previously seen from the Lower Provinces, and have evidently been carefully selected and packed. It would appear that these apples stand the climate better than the general run imported in previous years.

They are shipped as ordinary cargo and on consignment, and during the year the shipments have been fortnightly in lots of 25 to 30 barrels. This quantity meets the demand for these particular varieties of apples, and the prices obtained for them have been fairly high and must have been remunerative. Small shipments of other grades of apples are occasionally imported into Barbados, but as a rule they do not arrive in such good condition and bring lower prices.

BRITISH COLUMBIA APPLES

Several years ago a firm in British Columbia made a shipment of a carload of apples of the Newtown variety to the West Indies by the Royal Mail Steamship Company from Halifax. About 150 boxes, containing approximately 100 apples each, were consigned to Barbados, and the balance divided between Trinidad and Demerara. The shippers reported that the returns from Trinidad and Demerara were satisfactory, but that they fell somewhat short from Barbados. Inquiry at the time in Barbados disclosed the fact that the shipment was larger than the market could absorb, and that the apples had to be sold at a lower price than would have been obtained had conditions been more favourable. No further shipments by this firm were made to Barbados, but the business has been followed up to the present time with Trinidad and Demerara, the varieties supplied being principally Newtowns with some Spitzenbergs included.

INCREASED DEMAND FOR APPLES

As compared with 1913, the demand for fresh fruit of all kinds would appear to be growing in these islands, as there is an increased import. The total quantity imported in 1913 into Barbados, Trinidad and Demerara valued £8,051, of which £1,181 were apples, but latest available returns show the import has increased to £3,578, and probably 1923 will show a further increase.

In former years most of the apples were imported from the United States, but since 1920 the bulk of the supply has been from Canada. Last year the import from the United States fell off by £784 as compared with 1913, although the total import into all the islands since that year has more than trebled. Recently some small shipments, about sixty barrels, have been reported from the United States.

A LIMITED MARKET

The demand for apples in the West Indies will always be limited, as the supply of native fruit is abundant and the price at which it is sold much lower than any Canadian imported fruit. Large shipments of apples are therefore to be discouraged as the fruit would, on arrival, require to be placed in cold storage, and would in this way be expensive and might require to be forced into the market at a low price. It is probable, however, that the market would absorb more apples monthly than have yet been received if shipments were not too large, were made regularly, and care taken in packing.

Apples from British Columbia have been received here in excellent condition, due probably to the fact that they were packed in crates holding from 100 to 150 apples rather than in barrels. In discussing this matter, it was found that in the opinion of the importers here packing in crates would be in the interest of the business.

COMMERCIAL NOTES FROM NEW SOUTH WALES

Commercial Agent B. Millin

Trade Conditions in New South Wales

Sydney, January 25, 1923.—Business has made on the whole a fair start for the year and merchants generally express the opinion that the outlook is promising, a distinct briskness being very noticeable. The situation, however, obviously demands considerable caution, particularly on the part of the banks, but they are meeting the situation judiciously, and in the restoration of the normal value of trade are assisting as far as possible by a policy of meeting all legitimate requirements.

Seasonal conditions throughout the State continue to cause much anxiety in the pastoral and agricultural industries. A prolonged spell of dry weather has been experienced for some time, but has fortunately been broken by small falls of rain just sufficient to meet temporary needs. Monsoonal rains generally fall during February, and are very badly needed.

An extraordinary demand still continues for wool and the high prices now being obtained are exceedingly satisfactory to wool growers.

Growth of Automobile Traffic

Returns compiled for New South Wales reveal a considerable increase in the number of motor-driven vehicles registered for the year ended December 31, 1922. The number of automobiles registered during the year ended 1921 totalled 28,665, as compared with 34,776 for 1922. Lorries increased from 3,524 to 4,465, and motor cycles from 11,291 to 12,143. The revenue derived under the provisions of the Motor Tax Act increased from £131,025 to £161,874.

Decreased Gold Production

Gold was first discovered in New South Wales in 1851, and in the following year a record was established in the total amount mined for any one year, the value being £2,260,000. The aggregate of gold found to date is valued at £63,000,000.

The industry, however, is on the decline, the main reason for which is ascribed to the high rate of wages prevailing for the last few years, which precludes the profitable working of the low-grade ores from which the bulk of the gold has been extracted in recent years. The value of the gold produced last year was £107,139, the lowest on record, and a decrease of £100,000 on the previous year.

Trade of New South Wales

New South Wales imported during the first five months of the current financial year up to November 30 last, 42 per cent more, on a basis value, than in the corresponding period of 1921. The total value of the imports for the period extending from July, 1921, to November, 1921, was £16,330,567, and that for the same period of 1922 was £23,270,616, an increase of £6,940,049. The value of the total exports for the same period increased by £368,042. The total export for the 1921 period was estimated at £18,301,719, whilst that for 1922 was £18,669,761. The balance of trade for the period shown was thus against the state to the value of £4,600,855.

Wheat Harvest, 1922-23

It is estimated that this season's wheat yield will return 29,000,000 bushels, or an average of 10·2 bushels per acre. The highest recorded wheat yield for

the state was for the season 1915-16, when 66,764,910 bushels were harvested, showing an average yield of 15·94 bushels per acre. The highest average yield recorded was 17·5 per acre.

Oil Boring Operations in Australia

For some time past operations have been proceeding at Roma, in the State of Queensland, for the purpose of proving the supposed existence of oil supplies. The sum of £35,000 has been spent in boring, and a depth of 3,705 feet was reached when the finger of the bit broke and all attempts to get it out were unsuccessful. An attempt was made to deviate, but water rushed in and the enterprise was forced to close down. It was proved, however, that there was an enormous gas pressure, and the flow of gas yielded by test a pint and a half of petrol per 1,000 cubic feet.

The test was made by the Government of the State, and although it has relinquished operations, a private company intends to make further tests.

Trade with France

Two converted French warships, the *Jules Michelet* and *Victor Hugo*, recently visited Sydney for the purposes of commercial propaganda. During the visit of the vessels to Sydney endeavours were very successfully made to draw attention to the resources of France in raw materials, such as ores, phosphates, potash, etc., and to her manufactured articles. Attention was also drawn to the requirements of France as regards raw materials which could be obtained from Australia.

During the stay of the vessels various lectures were delivered by the mission, which was composed of representatives of the French Departments of Commerce, Colonial Office, Public Works, and Foreign Office. The lectures were delivered at the Sydney Chamber of Commerce to representative gatherings.

ECONOMIC CONDITIONS IN BELGIUM

Trade Commissioner A. S. Bleakney

Brussels, February 2, 1923.—The occupation of the Ruhr is, of course, the feature of the present industrial situation in Belgium. In the metallurgical trade the market has practically ceased to exist, most factories refusing to quote in the present uncertainty. Adverse features of the situation are the extreme scarcity of coke and the rise in exchange with consequent sharp rises in price. Favourable features are the disappearance, or at least disorganization, of German competition, improved export prospects with the cheaper franc, and an important American demand for coal. The failure of coal deliveries from the Ruhr is not expected to affect Belgian production by more than 25 per cent, the Belgian coke supply being relatively large in relation to other countries affected. Coal production for December was 94·12 per cent of the 1913 monthly average. For the year the output was 92 per cent of the pre-war rate. The industrial situation in general is good.

A recent development which should affect commerce favourably is the announcement of the early opening of a car-ferry service between Zeebrugge and Harwich, England furnishing the ferries and Belgium the cars. The advantages of the service will be absence of transhipment, gain of time, cheaper packing for fragile goods, and diminished risk of pilferage, the cars being locked to point of destination. It is predicted that the through rate will be considerably less than with transhipment. This service should be of distinct interest to Canadian firms carrying stocks in England and working the Continent from that centre.

The Banque Nationale de Belgique has just declared its 1922 dividend, amounting to 200 francs. (The par value of the shares is 1,000 francs; present approximate market value 4,500 francs). The following table gives the dividends since 1912:—

	Francs		Francs
1922	200	1916	40
1921	195	1915	40
1920	189.50	1914	105
1919	170	1913	170
1918	105	1912	168
1917	40		

On the Bourse, with the exception of government bonds, which show a tendency to fall, values are generally higher than last month, great activities being shown in tramway and glass shares. Bank shares are firm, but railways are weak.

PROSPERITY OF THE PORT OF HAMBURG

Trade Commissioner L. D. Wilgress

Hamburg, February 8, 1923.—In spite of the serious financial situation in Germany, the trade of the Port of Hamburg continues to make progress. The shipping returns for the year 1922, recently issued, show that the sea traffic of the port increased 40 per cent over the previous year, and that the total figure was only about 8 per cent below that of the pre-war traffic. In view of the stagnation during the war period this must be considered a remarkable recovery, and it is an indication of the advantages which Hamburg possesses as a port serving a large part of Northern and Central Europe.

COMPARISON WITH OTHER PORTS

Besides recovering the greater part of its pre-war traffic, the Port of Hamburg has also regained its former position as the leading port of continental Europe. The following table compares the incoming shipping of Hamburg with that of the two other principal continental ports, Antwerp and Rotterdam, and illustrates the recovery of the Hamburg shipping traffic since the war:—

Year	Hamburg Net Register Tons	Antwerp Net Register Tons	Rotterdam Net Register Tons
1897	6,700,000	5,600,000	5,400,000
1910	12,600,000	11,400,000	10,800,000
1913	14,200,000	12,700,000	12,000,000
1920	4,537,331	9,230,087	7,609,777
1921	9,572,821	11,033,125	10,262,694
1922	13,005,089	12,775,955	12,262,694

HARBOUR FACILITIES

Hamburg owes its importance as a port largely to its situation sixty miles from the mouth of the Elbe. This river provides a navigable waterway connecting Hamburg with the interior of Germany, and with Czecho-Slovakia. A large proportion of the traffic of the port is transferred to ocean-going vessels from river barges and vice versa. During 1922 nearly 200,000 tons of Czecho-Slovak products were shipped to foreign countries by way of the Elbe river and the port of Hamburg, while the imports in Czecho-Slovakia by this route amounted to about one million tons. In addition Hamburg is connected with all parts of Europe by an excellent network of railways, which admirably serve the port. Hamburg is therefore not only the chief port for all Central and

Eastern Germany, but it is also the gateway to Czecho-Slovakia, and handles a large share of the trade with Poland, Central Europe, and the Baltic States.

The Hamburg harbour is one of the best equipped, and is capable of accommodating the largest vessels. The whole area comprises about 9,900 acres, one-third of which is occupied by the free port. The completely equipped docks have a total length of 29½ miles, and two-thirds of these are situated at deep water where ocean steamers can berth. The total length of the water frontages in the free harbour is 51 miles, and in the harbour, as a whole, over 105 miles. The warehouses and sheds cover an area of 258 acres. These figures give some idea of the extent of the Hamburg harbour, which is equipped with the most up-to-date facilities for loading and discharging cargo, and for effecting rapid and efficient repairs to ships.

SHIPPING STATISTICS

The following table taken from a recent issue of the *Wirtchaftsdienst* gives the total number and the total net register tons of the ships which entered and cleared from the port of Hamburg during the last three years, while the figures for 1913 are given for sake of comparison:—

	Entered		Cleared	
Year	No. of Ships	Net Register Tons	No. of Ships	Net Register Tons
1913	15,073	14,185,000	16,627	14,439,000
1920	4,808	4,486,000	5,096	4,353,000
1921	8,401	9,421,000	9,842	9,443,000
1922	10,787	12,979,000	12,782	13,303,000

The above table shows that the sea-going traffic of the port increased in tonnage during 1922 about 40 per cent over that of the previous year and was only about 8 per cent below that of 1913. Increased imports of coal from Great Britain may be said partly to account for the favourable showing of the 1922 returns. On the other hand, the traffic of the port was seriously interfered with by the difficult ice conditions during the early months of the year and by the strike of engineers which held up German shipping during the greater part of July. If it had not been for these factors, it is probable that the total tonnage of shipping for 1922 would very nearly have attained the 1913 figure. As it was, during certain months of the year the shipping tonnage exceeded that of the corresponding months of 1913.

It will be noted that, while the net register tons of ships entered and cleared are nearly equal to the 1913 figures, the number of vessels in each case is still considerably below the pre-war totals. This must be attributed chiefly to the great decrease in the coasting trade as compared with before the war as well as partly to the increase in the average size of the vessels employed in the deep-sea trade.

The proportion of cargo carried to available space was higher in 1922 than in the previous year both in regard to incoming and outgoing traffic. The following are the percentages of the utilized tonnage space to the total available during years in question:—

Year	Incoming Vessels	Outgoing Vessels
1913	92%	71%
1920	92%	74%
1921	87%	71%
1922	89%	74%

NATIONALITY OF VESSELS

British vessels formed the largest proportion of those arriving at and departing from Hamburg during 1922. The British flag was represented by about 34 per cent of the total tonnage using the port, as compared with the proportion of

29 per cent in 1913, when British shipping stood second to German in the Hamburg traffic returns. The German flag in 1922 occupied second place with 27 per cent of the total. This, however, is a considerable improvement over 1921, when German shipping represented 20 per cent of the total sea traffic of the port. There was a decrease in the proportion of United States vessels from 17 per cent in 1921 to about 10 per cent in 1922, and the United States flag now occupies fourth place, coming after the Dutch, which was represented by 11 per cent of the total shipping tonnage last year.

The increase in the proportion of German shipping in the Hamburg sea traffic is significant as illustrating the progress which has been made in the rebuilding of the German mercantile marine. This increase was chiefly due to the addition of ocean-going vessels, the average cargo capacity of the German ships using the port having increased from 425 register tons in 1921 to 663 tons last year. Before the war German shipping accounted for nearly two-thirds of the total arrivals at and departures from Hamburg.

The following table shows the number of vessels and the total register tons of the leading countries whose shipping is represented in the Hamburg port returns for 1922, the corresponding figures for 1913 being given for the sake of comparison:—

	ARRIVALS				DEPARTURES			
	1913		1922		1913		1922	
Nationality	No. of Vessels	1,000 R. Tons	No. of Vessels	1,000 R. Tons	No. of Vessels	1,000 R. Tons	No. of Vessels	1,000 R. Tons
German..	9,005	8,581	5.280	3,502	10,183	8,726	7,139	3,713
Swedish..	352	163	112	135	418	179	114	126
Norwegian	593	405	485	532	611	417	494	555
Danish..	516	158	567	330	617	188	600	327
British	3,500	4,096	2,531	4,420	3,523	4,114	2,544	4,473
Dutch	775	382	889	1,451	917	397	955	1,458
French..	132	120	170	373	129	112	166	358
United States	1	3	304	1.363	1	3	305	1,386
Japanese..	....	....	55	234	....	....	58	246

SIGNIFICANCE OF SHIPPING RETURNS

The statistics given above from the shipping returns of the port of Hamburg are of value as, owing to the lack of reliable trade returns, they afford one of the best indications of the trend of German trade. Certain factors, however, require to be taken into consideration, such as the low port and handling charges due to the depreciated currency, which tend to attract shipping to Hamburg at the expense of other ports. Certain foreign lines have been using the port owing to the possibility of having repairs cheaply effected, but the charges for ship repairs are tending more and more to approach those of British and other yards. The fact must also not be overlooked that Hamburg serves as a port for Czecho-Slovakia and other countries, so that not all of the sea traffic of the port represents trade with Germany. After making allowances for these factors it must be admitted that the rapid advance of the Hamburg port returns indicates a considerable expansion of German foreign trade during the last four years. It is therefore of interest to examine the figures of shipping to and from Hamburg and the principal markets of the world so as to ascertain the extent to which Germany has re-established her pre-war shipping connections with overseas countries.

SHIPPING TRAFFIC WITH VARIOUS COUNTRIES

The tables given below show clearly the ports of origin of incoming ships and the destinations of outgoing ships arriving at and departing from Hamburg during 1922 and compared with 1913:—

ARRIVALS

	1913		1922	
	No. of Vessels	1,000 Register Tons	No. of Vessels	1,000 Register Tons
German Ports	4,455	1,245	1,717	1,043
North Europe	2,816	929	3,215	1,162
Great Britain and Ireland	3,479	3,249	2,570	2,368
Holland and Belgium	726	654	772	815
France, Spain, Portugal, and Azores	547	463	413	445
Italy, Austria-Hungary, Greece, European Turkey	103	147	109	113
Bulgaria, Rumania, European Russia on the Black Sea	227	535	84	139
Europe together	12,853	7,220	8,880	6,085
British North America on Atlantic Ocean	22	57	91	378
United States on Atlantic Ocean	451	2,143	539	2,335
West Indies, Mexico, Panama, Colombia, Venezuela.	166	351	73	151
Brazil	119	339	79	257
Argentina and Uruguay	268	905	196	739
South Georgia, and South Shetland Islands	3	7	1	2
America West Coast	186	528	108	372
Africa on the Mediterranean	64	89	60	68
Africa on the Atlantic	305	560	141	281
Africa on the Indian Ocean including British South Africa	116	476	96	371
Asia on Mediterranean and Black Sea	104	202	71	84
Arabia and Persia	8	22	....	....
East Indies	245	744	292	1,155
China, Japan, and Russia on the Pacific	76	281	111	508
Australia, and Pacific Islands	87	261	49	193
Countries outside Europe together	2,220	6,965	1,907	6,894
Total	15,073	14,185	10,787	12,979

DEPARTURES

	1913		1922	
	No. of Vessels	1,000 Register Tons	No. of Vessels	1,000 Register Tons
German Ports	5,077	1,305	1,657	893
North Europe	3,620	1,075	5,370	1,580
Great Britain and Ireland	4,769	4,757	2,939	3,369
Holland and Belgium	701	682	599	837
France, Spain, Portugal and Azores	429	317	340	343
Italy, Austria-Hungary, Greece, European Turkey	131	169	90	90
Bulgaria, Rumania, European Russia on the Black Sea	48	89	73	106
Europe together	14,775	8,394	11,068	7,223
British North America on Atlantic Ocean	23	68	47	....
United States on Atlantic Ocean	355	1,856	426	1,981
West Indies, Mexico, Panama, Colombia, Venezuela.	152	356	128	249
Brazil	189	438	77	245
Argentina and Uruguay	122	557	187	777
South Georgia and South Shetland Islands	1	2	1	2
America West Coast	167	475	142	472
Africa on the Mediterranean	37	49	83	82
Africa on the Indian Ocean including British South Africa	138	543	119	454
Africa on the Atlantic	274	527	137	266
Asia on the Mediterranean and Black Sea	66	121	43	46
Arabia and Persia	13	36	....	....
East Indies	162	524	170	603
China, Japan, and Russia on the Pacific	100	337	113	488
Australia and Pacific Islands	53	156	41	170
Countries outside Europe together	1,852	6,045	1,714	6,080
Total	16,627	14,439	12,782	13,303

The above table indicates that, while the Hamburg traffic with overseas countries has nearly attained the pre-war standard, traffic with European countries is still considerably restricted. This is particularly the case with the Hamburg coasting trade or the traffic with other German ports, which is still a long way behind its former activity. The shipping with Great Britain increased considerably last year, but it is not yet as great as before the war. On the other hand, the traffic with Northern Europe is more considerable than in 1913.

Last year brought about a very great increase in the Hamburg shipping traffic with overseas countries. More ships are now engaged in the trade with Canada, the United States, Argentina, East Indies, China, and Japan than before the war. Only the traffic with the West Indies and Central America, Brazil, and West and East Africa is still behind the pre-war standard. It would thus appear that only the unsettled conditions in Europe have prevented the sea traffic of Hamburg from attaining pre-war dimensions in all its branches.

CHIEF STEAMSHIP CONNECTIONS

With the growth in the volume of Hamburg shipping there has been a steady increase during the past four years in the establishment of regular steamship lines to and from overseas countries. The German companies have now vessels plying on nearly all the routes on which German shipping was represented before the war, while there are considerably more foreign steamship companies using the port of Hamburg than in pre-war years. In order to conserve their resources, many of the German steamship companies have formed agreements with other German or foreign companies for running joint lines. The following list of the principal steamship lines running between Hamburg and overseas countries will indicate the extent to which the port has re-established its former shipping connections, (F.) denoting freight and (P.) passenger lines:—

STEAMSHIP LINES WITH REGULAR SAILINGS FROM HAMBURG

Hamburg-Canada (Atlantic Coast)—

Foreign—Canadian Pacific (Passenger and Freight); Head Line (F.); County Line (F.).

Hamburg-United States (East Coast)—

Foreign—Cunard Line (P. and F.); Royal Mail Line (P. and F.); United American Lines in conjunction with Hamburg America Line (P. and F.); American Line (P. and F.); Rogers & Webb Line (F.); Lykes Line (Gulf Ports), (F.).

German—Hamburg America Line in conjunction with the United American Lines (P. and F.); Continental Steamship Line (F.).

Hamburg-West Indies and Central America—

Foreign—Royal Mail Line (F.); East Asiatic Company (F.); Dutch West Indian Line (F.).

German—Hamburg America Line (P. and F.); Hugo Stinnes Line (P. and F.); 1896 Steamship Company (F.); Ocean Line (F.); Horn Line (F.); Continental Steamship Line (F.).

Hamburg-West Coast of Central and North America—

Foreign—North Pacific Coast Line of the Royal Mail Steam Packet Company and the Holland America Line (calling at British Columbian ports) (P. and F.); East Asiatic Company (calling at British Columbian ports) (F.).

German—Joint service of the Roland and the Cosmos Line (F.).

Hamburg-South America (East Coast)—

Foreign—Booth Line (F.); Halcyon Line (F.); Skogland Line (F.); Compania Naviera Sota and Aznar (F.); Lloyd Brasileiro (P. and F.); Holland Lloyd and Rotterdam South America Line (P. and F.).

German—Hamburg America Line (P. and F.); Hamburg South American Steamship Company (P. and F.); Hugo Stinnes Line in conjunction with Artus (Danzig) Line (P. and F.); North German Lloyd (P. and F.); Schröder, Hölken and Fischer (F.).

Hamburg-West Coast of South America—

Foreign—East Asiatic Company (F.); Dutch West Indian Line (F.).

German—Hamburg America Line (P. and F.), joint service of the Roland Line and the Cosmos Line (F.).

Hamburg-Far East—

Foreign—Joint service of the Glen Line and the Shire Line (F.); Nippon Yusen Kaisha (P. and F.); Osaka Shosen Kaisha (P. and F.); East Asiatic Company in conjunction with Swedish East Asiatic Company and Wilhelm Wilhelmsen (Norway) (F.).

German—Hamburg America Line in conjunction with the North German Lloyd (P. and F.); Hugo Stinnes Line (P. and F.); Rickmers Line (F.).

Hamburg-India and Dutch East Indies—

Foreign—Well Line (Indian Ports) (F.); British India Line (Indian Ports) (F.); Holland British India Line (Indian Ports) (F.); East Asiatic Company in conjunction with Norwegian Africa and Australia Line and Swedish Transatlantic Line (F.).

German—Hansa Line (P. and F.); German Australian Steamship Company in conjunction with the Cosmos Line (F.).

Hamburg-Australia—

Foreign—Alfred Holt and Company (F.); Commonwealth Government Line (F.); White Star Line (F.); Holland Australia Line (F.); East Asiatic Company in conjunction with the Norwegian Africa and Australia Line and the Swedish Transatlantic Line (F.).

German—North German Lloyd in conjunction with the German Australian Steamship Company and Alfred Holt and Company (British) (F.).

Hamburg-Africa (Excluding North Africa)—

Foreign—Elder Dempster and Company (F.); Union Castle Line (F.); Holland South Africa Line (P. and F.); Holland East Africa Line (F.); Holland West Africa Line (F.).

German—German Africa Line (P. and F.), comprising joint service of the Woermann Line, Hamburg America Line, German East Africa Line and the Hamburg Bremen Africa Line.

Hamburg-Mediterranean and Black Sea Ports—

Foreign—Halcyon Line (F.); Swedish Orient Line (F.); Adria in conjunction with the German Levant Line (F.).

German—German Levant Line (F.); Robert Sloman, Jnr. (F.); Röchling, Menzell and Company (F.); German Orient Line (F.).

The above are the principal steamship lines now running from Hamburg to overseas countries. The only other German port of importance to overseas trade is Bremen, which is the headquarters of the North German Lloyd. This company, in addition to its services to South America, the Far East and Australia, operates a joint service with the United States Mail Steamship Company between Bremerhaven and New York. The White Star Line also use Bremen as the terminal port for their line between Germany and New York via Halifax. The J. W. H. Steele Company of Galveston operate regular steamers between Mexican Gulf ports and Bremerhaven.

In a subsequent report it is hoped to deal with the efforts being made by German steamship companies for the rebuilding of their fleets.

PROSPECTS FOR CANADIAN MANUFACTURED PRODUCTS IN ARGENTINA

Trade Commissioner B. S. Webb

[In view of Mr. Webb's forthcoming visit to Canada, this report on the Prospects for Canadian Manufactured Products in Argentina should be read with special interest by Canadian firms.]

As native industries are exceedingly limited, Argentina imports practically all classes and types of manufactured articles, the largest percentages of which are supplied by Great Britain, the United States and Germany. It is of course appreciated that in certain highly specialized lines such as Manchester cottons, German chemicals and dyes or United States shoe machinery, competition is out of the question but with such exception it is hypothetically possible that Canada can at present, or may eventually be able to supply the great majority of Argentine market requirements, once production costs and selling methods reach a sufficiently high level. The following brief notes, therefore, are of present value only, as changes in both market conditions in Argentina and manufacturing standards in Canada may at any time make possible the successful export of Canadian products not now competitive in price or quality.

(1) The following commodities have been supplied from Canada during the past few years:—

Adding machines.
Agricultural implements.
Automobiles.
Automobile accessories.
Bags.
Barrels and staves.
Balata belting.
Belting, canvas.
Biscuits.
Boats and canoes.
Boilers.
Boiler compound.
Books, note.
Bootmakers' supplies.
Bottles.
Brushes.
Buckets.
Calcium carbide.
Cardboard.
Carts and carriages.
Cement.
Chains, non-skid.
Chairs.
Chloride of lime.
Chocolate confection.
Coal.
Cotton fabric.
Cultivating machines.
Dairy appliances.
Dried cod.
Electric appliances.
Extracts.
Enamelware.
Fly killers.
Filtres.
Fish, canned.
Furniture.
Glass articles.
Glass, flat.
Glass, window.
Gum.
Haircloth.
Hames.
Hardware.
Ink, printing.
Iron.
Lamps, oil.
Lanterns.
Lobster, canned.
Pine.
Lumber, spruce.
Lumber, white pine.
Lumber, other.
Machines, sewing.
Machinery, general.
Magnesite.
Malt.
Methylene.
Motors, gas and accessories.
Newsprint.
Organs.
Paints and varnishes.
Paper.
Paper, tissue.
Paper, wrapping.
Paper, writing.
Pharmaceutical products.
Phonographs.
Photographic material.
Pianos.
Piping, galvanized.
Piping.
Ploughs and accessories.
Plated ware.
Pulp.
Radiators (automobile).
Rice.
Roofing material.
Rubber goods.
Rubber packing.
Shoemakers' supplies.
Shoes, canvas.

Skewers.
Soda caustic.
Silicon.
Stationery.
Steel.
Steel (hoops).
Steel merchant bars.
Stockings.
Stoves and ranges.
Surgical rubber.
Tea.
Threshing machines.
Tires, rubber.
Tractors and accessories.
Trucks.
Twine.
Valves, metal.
Wallpaper.
Washing machinery.
Wheelbarrows.
Wheels, steel.
Whisky.
White lead.
Windmills.
Wire.
Wooden pegs.
Woollen goods.

(2) Of the foregoing commodities, the following are not now being shipped to Argentina:—

Chocolates.—Price and packing.

Woollen stockings.—Unsatisfactory type.

Stoves and ranges.—European steel types control market.

Canned lobster.—Canadian exporters no longer interested in shipping.

Canned fish.—Canadian exporters no longer interested in shipping.

Biscuits.—Packing and transportation difficulties.

Chairs.—Transportation charges, and local manufacture.

Phonographs.—Dominance of well known trade marks and local manufacture of cheap instruments.

Electrical appliances.—Very keen German and British competition.

(3) It is almost impossible at present to sell Canadian lines of the following goods:—

Heavy woollens.—Too heavy for climate and price too high.

Wooden furniture.—Freight charges and local manufacture.

Carts, carriages and wagons.—Freight charges and local manufacture.

Boots and shoes.—Canadian qualities not suitable; local industry highly protected by tariff.

Seeds and potatoes.—Sanitary and inspection regulations too stringent.

Oils and greases.—United States competition.

Wire fencing.—Locally manufactured from imported wire.

Douglas fir.—Canadian cutting and shipping methods unsatisfactory to Argentine importers. Green shipping and scant cutting.

Typewriters and accessories.—Require the establishment of a school and service organization.

Steel furniture.—No local demand; wood cheaper.

Cutlery.—German competition.

Tinsmith's tools.—German competition.

Musical instruments.—German competition, except pianos if in price.

Lanterns, lamps, etc.—United States and German competition.

Baking powder.—Necessity for extensive advertising.

Metal polishes.—Necessity for extensive advertising.

Ice-making machinery and refrigerators.—Cheap local ice.

Ice boxes and kitchen cabinets.—Freight rates and local manufacture.

Hats and caps.—Italian, British and United States competition. Local manufacture of cheap lines.

Glass and accessories.—British and Continental competition.

Bicycles.—Styles and weights.

Locomotives and railway material.—British standards and prestige.

(4) With considerable difficulty and prolonged effort the following commodities could probably be sold profitably:— —

Biscuits, chocolates, canned fish, apples.—The main requisite for success in these lines is improved packing and shipping methods and the expenditure of capital in local advertisement.

Paints and varnishes.—The popularising of trade mark is the main consideration.

Trucks, motor trucks.—Bad road conditions are being improved. Narrow streets a drawback—cheap horses.

Concrete mixers.—Price and freight charges would have to be competitive with United States.

Caustic soda.—Must compete with the United Alkaline Products Co.

Lighting plants.—Technical education of representatives and buyers.

Steam accessories; boilers; pumps; valves; road-making machinery; electrical supplies; windmills; woodworking machinery; metal-working machinery.—Most of the importing houses big enough to handle these lines are already doing so on behalf of United States and European manufacturers. Representation difficult. First order on consignment. Catalogues and technical instructions in Spanish.

Edge tools; shelf hardware.—British, United States and German competition very keen.

Tires.—Advertising in competition with well-known makes.

Textiles (woollen).—Weights generally too heavy. Bradford competition keen. Very light weights in homespuns (women's) Jersey-cloth and specialties could find a market with good representation. No competition possible in tweeds and worsteds. Light woollen underwear and stockings of specialized makes will find a market with adequate advertising.

Textiles (silk).—Chief disability: price. Good lines in thread silk stockings and underwear have some chances of success. Gloves and glove-silk would find limited market if competitive in price with France. Broad goods for local manufacture offer easiest market.

Textiles (artificial silk).—If very low in price. Otherwise duties make it impossible.

Textiles (cottons).—Practically impossible.

Specialties.—Any textile specialty will sell on its own merits irrespective of price if it seizes popular fancy.

Underwear; socks (men's); neckwear; scarves; cravats, etc.—Very difficult in any material, but exceptional lines properly priced and represented might eventually do very well.

(5) There is a large and comparatively easy market for the following commodities, although a few (except newsprint) are temporarily out of price:—

Binder twine.
Spruce lumber.
Calcium carbide.
Enamelled ware.
Iron and steel—
  Merchant bars.
  Galvanized and plain wire.
  Barbed wire.
  Black plain wire.
Piping, black and galvanized.
Rubber goods, surgical.
Paper and paper products.
Wheelbarrows, steel.
Newsprint.
Agricultural implements.
Wallpaper.
Asbestos.
Flour bags.
Malt.
Tinplate.
Garters, suspenders, etc.
Wire cloth.
Chains (automobile).
White pine, lumber.
Haircloth.
Roofing material (rolls).
Dairy machinery.
Balances.
Meat slicers.
Bootmaking materials.
  Counters.
  Heels.
  Polishes.
Optical goods, simple types.
Motor accessories.
Cement.
Batteries, storage, lighting and radio.
Automobiles.
Buttons (specials).
Galvanized iron, steel sheets.
Skewers, wood.
Expanded metal.
Radio accessories.

TRADE AND FINANCIAL CONDITIONS IN BRAZIL

Major E. L. McColl, Canadian Trade Commissioner in Brazil, has forwarded under date March 3 the following cablegram descriptive of business and financial conditions in Brazil: " The value of exports over imports in Brazil in 1922 produced a favourable balance of $77,000,000. The rise in the price of agricultural products is causing a slow and steady improvement. While the national industry is active, the import trade is very dull. The financial condition of Brazil is obscure, exchange sensitive, and the future doubtful. The heavy purchasing by the Government for the service of foreign debt is certain to keep the exchange low unless a new funding loan can be arranged."

TARIFF CHANGES AND CUSTOMS REGULATIONS

South Africa Imposes Dumping Duty on Cement from Certain Countries

Mr. James Cormack, Assistant Trade Commissioner in Cape Town, under date of January 25, forwarded an extract from the official *Gazette* of the Union of South Africa imposing a dumping duty on cement made in Belgium, Denmark and Norway. The notice in the *Gazette*, in part, says that it has been made to appear that cement made in Belgium, Denmark and Norway is being sold for export to the Union at a price that does not represent the true current value thereof when sold in the open market for home consumption in the principal markets of these countries. Therefore, under section eight of the Customs Tariff Act of 1914, it is proclaimed that six weeks after the publication of the proclamation there shall be levied on cement imported into the Union from Belgium, Denmark and Norway a special (or dumping) customs duty, equal to the difference between the price at which the cement of a like grade is sold for home consumption in Belgium, Denmark and Norway, respectively, and the price at which it has been sold for export to the Union provided that such special (or dumping) duty shall not exceed 15 per cent ad valorem.

New Export Ordinance of Trinidad

Mr. E. H. S. Flood, Canadian Trade Commissioner, Barbados, writes under date February 8, 1923, that the Trinidad Ordinance No. 35 of 1922, cited as the Produce Taxation Ordinance, 1922, imposes special duties on all sugar, rum, bitters, molasses, cocoa, coconuts, and copra shipped from the colony during 1923, except that in the case of sugar, the tax shall apply to all sugar exported whether manufactured in 1923 or not, and also to all sugar manufactured in 1923, whether exported or not. The ordinance provides for duties to be levied both in aid of immigration and of the West Indian Agricultural College, except in respect of rum, bitters and molasses, when duty will only be collected on these items in aid of immigration.

The following is the schedule of taxes:—

	In Aid of Immigration	In Aid of West Indian Agr. College
Sugar (including local) (for every 1,000 lbs.)	2s. 10d.	10d.
Rum (for every 100 gals.)	5s. 0d.	
Bitters (for every 100 gals.)	5s. 0d.	
Molasses (for every 100 gals.)	7d.	
Cocoa (including foreign) (for every 100 lbs.)	1½d.	On local produce only 2½d.
Coconuts (including foreign) (for every 1,000 nuts)	2s. 0d.	" 4d.
Copra (for every 1,000 lbs.)	6s. 0d.	" 1s. 0d.

New Export Ordinance of Antigua

Mr. E. H. S. Flood, Canadian Trade Commissioner, Barbados, writes under date February 8, 1923, that the Antigua Ordinance No. 21 of 1922, cited as the Export Duty Ordinance, 1923, imposes certain export duties on all sugar, syrup, molasses and cotton shipped from the colony during 1923.

The schedule is as follows:—

SUGAR, CRYSTAL

Where the price of white, yellow, or grey sugar crystal per ton is:—

	Per Ton		Per Ton
Under £10	3s. 0d.	£20 and under £21	12s. 0d.
£10 and under £11	3s. 6d.	21 " 22	13s. 6d.
11 " 12	4s. 0d.	22 " 23	15s. 0d.
12 " 13	4s. 6d.	23 " 24	16s. 6d.
13 " 14	5s. 0d.	24 " 25	18s. 0d.
14 " 15	5s. 6d.	25 " 26	19s. 6d.
15 " 16	6s. 6d.	26 " 27	21s. 0d.
16 " 17	7s. 6d.	27 " 28	22s. 6d.
17 " 18	8s. 6d.	28 " 29	24s. 0d.
18 " 19	9s. 6d.	29 and not exceeding £30	25s. 6d.
19 " 20	10s. 6d.		

For every increase of 2s. 6d. per ton in price over £30 per ton, an increase of 3d. per ton.

SUGAR, MUSCOVADO

Where the price of muscovado sugar per ton is:—

	Per Ton		Per Ton
Under £14	1s. 0d.	£22 and under £23	11s. 0d.
£14 and under £15	1s. 6d.	23 " 24	12s. 6d.
15 " 16	2s. 6d.	24 " 25	14s. 0d.
16 " 17	3s. 6d.	25 " 26	15s. 6d.
17 " 18	4s. 6d.	26 " 27	17s. 0d.
18 " 19	5s. 6d.	27 " 28	18s. 6d.
19 " 20	6s. 6d.	28 " 29	20s. 0d.
20 " 21	8s. 0d.	29 and not exceeding £30	21s. 6d.
21 " 22	9s. 6d.		

For every increase of 2s. 6d. per ton in price over £30 per ton, an increase of 3d. per ton.

SYRUP

Where the price of syrup per 100 gallons is:—

	Per 100 Gals.
Under 10d. per gallon	Nil
10d. per gallon and under 15d	4s. 0d.
15d. " " 25d	6s. 0d.
25d. " " 30d	9s. 0d.
30d. " " 35d	13s. 0d.
35d. " " 40d	16s. 0d.
40d. " " 45d	21s. 0d.
45d. " " 50d	24s. 0d.

For every increase of 1d. per gallon in price, an increase of 10d. per 100 gallons.

MOLASSES

	Per 100 Gals.
Molasses, from crystals	1s. 0d.
Molasses, from Muscovado	2s. 0d.

COTTON

Where the price per pound of clean lint is:—

	Per Pound
Under 2s. 6d. a pound	One halfpenny
2s. 6d. a pound and over	One penny

British Guiana Customs Tariff Changes

Several changes have been made in rates of duty in the British Guiana customs tariff since the publication of Customs Duties Ordinance No. 32 of 1920 of that colony in *Weekly Bulletin* No. 889 (February 14, 1921). The British Guiana tariff as then published has been compared with the British Guiana Customs Duties Ordinance, 1923, and the changes in duties are set forth in the subjoined statement. Firms who have received the British Guiana tariff in leaflet form as reprinted from the *Weekly Bulletin*, with amendments added, are reminded that the information given herewith includes any portion of these amendments which remains in effect.

VALUE CALCULATED ACCORDING TO RATE OF EXCHANGE

For Section 5 of the British Guiana Customs Duties Ordinance, read:—

Where the cost of goods (as ascertained in section four of this Ordinance) imported from a foreign country is expressed in the currency of that country, the value for the purpose of ad valorem duty shall be calculated in sterling money according to the current rate of exchange on the day of arrival of the ship, and the importer shall pay duty on the value so calculated: Provided that where goods of German origin or manufacture are imported into the Colony the value shall be calculated in sterling according to the value of goods of similar character imported from other countries.

CHANGES IN FIRST SCHEDULE (SPECIFIC DUTIES)

Tariff Item.		British Preferential Tariff	General Tariff
5	Beer, ale, stout or porter—		
	(*a*) In bulk... per gallon	$ 0 30	$ 0 50
	(*b*) In bottle... per gallon	0 26	0 36

CHANGES IN FIRST SCHEDULE (SPECIFIC DUTIES)—*Concluded*

Tariff Item.		British Preferential Tariff	General Tariff
16	Cider and perry—		
	(*a*) In bulk.. .. ..per gallon	0 20	0 40
	(*b*) In bottle.. .. ..per gallon	0 24	0 48
28 (*d*)	—Rice.. .. ..per 100 lbs.	0 50	1 00
Ex. 34	Matches—		
	(*a*) In boxes containing not more than 100 matches each, per gross of boxes..	1 00	2 00
	(Matches in boxes containing any greater quantity than 100 matches each to be charged in proportion.)		
	(*b*) Other than in boxes.. .. ..per 14,400	1 10	2 20
	(*c*) Vestas.. .. ..per 14,400	1 50	3 00
37 (*b*)	Petrol, including gasoline, mineral naphtha, benzine and petroleum spirit.. .. ..per gallon	0 10	0 20
Ex. 49	Enumerated spirits—		
	(1) Brandy.. .. .. The proof gallon	4 00	5 00
	(2) Gin.. .. .. The proof gallon	4 00	5 00
	(3) Whisky.. .. .. The proof gallon	5 00	5 60
	(4) Rum.. .. .. The proof gallon	5 00	5 60
	Unenumerated Spirits—		
	Sweetened.. .. ..the proof gallon	5 00	5 60
	Not sweetened.. .. ..the proof gallon	5 00	5 60
	Liqueurs, cordials, mixtures and other preparations containing spirits in bottle, entered in such a manner as to indicate that the strength is not to be tested.. the liquid gallon	6 00	6 60
	Perfumed spirits, not over proof.. .. ..the liquid gallon	3 00	6 00
Ex. 54	Tobacco—		
	Manufactured, viz.:		
	Cigars and cigarettes.. .. ..per lb.	1 50	3 00
	Snuff.. .. ..per lb.	1 50	3 00
	Other sorts.. .. ..per lb.	1 20	2 40
	In leaf—		
	If in packages containing not less than 400 lbs—		
	Containing not less than 25 lbs. and not more than 38 lbs. of moisture in every 100 lbs. weight thereof.. .. ..per lb.	0 50	0 60
	Containing less than 25 lb. of moisture in every 100 lbs. weight thereof.. .. ..per lb.	0 78	0 90
	If in packages containing less than 400 lbs.—		
	Containing not less than 25 lbs. and not more than 38 lbs. of moisture in every 100 lbs. weight thereof.. .. ..per lb.	0 60	0 70
	Containing less than 25 lbs. of moisture in every 100 lbs. weight thereof.. .. ..per lb.	0 88	1 00
Ex. 59	Wine—		
	(*a*) Sparkling.. .. ..per gallon	1 80	2 25
	(*b*) Still—		
	(1) In bottle, and containing not more than 26 per centum of proof spirit, as verified by Sykes' Hydrometer.. .. .. ..per gallon	0 80	1 00
	(2) In bulk and containing not more than 30 per centum of proof spirit as verified by Sykes' Hydrometer.. .. ..per gallon	0 60	0 75
	For each degree or fraction of a degree of strength of still wine in excess of 26 or 30 per cent (as the case may be) per centum of proof spirit as aforesaid an additional duty of 12 cents per gallon until the strength reaches 42 per centum of proof spirits.		
	Omit 2(e), 4, 8, 60(f), 60(g).		
	Omit "cornmeal" from 28(b) and add "cornmeal" after "cornflour" in 28(e).		
	Add—		
	Milk, condensed—		
	(*a*) Containing not less than 10 per cent of butter fat.. .. ..per 48 lbs..	Free	0 48
	(*b*) Containing less than 10 per cent of butter fat.. .. ..per 48 lb.	4 80	9 00
	(Omit condensed milk from third schedule).		
	Saccharine.. .. ..per oz.	0 14	0 28

For surtax on duties enumerated in the first schedule, read:—

And in addition to each of the duties enumerated in the above schedule (except duties on matches or gold bullion, balata, rubber and other substances of a like nature coming from Venezuela) twenty-five per centum thereof, provided that on the duties on spirits and strong waters, tobacco and wines, there shall be charged fifteen per centum thereof.

CHANGES IN SECOND SCHEDULE (AD VALOREM DUTIES)

Tariff Item.	British Preferential Tariff	General Tariff
All other articles not in this or the first schedule particularly mentioned or in the third schedule particularly exempted..ad valorem..	16 2/3%	33–1/3%
And in addition to each of the duties (except the *last mentioned but one*) enumerated in the above schedule, fifty per centum thereof. The *last mentioned but one* is, in the official tariff, the item for unenumerated goods quoted in the preceding paragraph.		

ADDITIONS TO THIRD SCHEDULE (EXEMPTIONS FROM DUTY)

All materials for use exclusively in the denaturing of industrial alcohol manufactured in the colony.

All efficient and recognized special apparatus and instruments and their accessories which are used to increase the sense of hearing.

Bags, sacks, empty and not of paper, canvas or cotton.

Cattle (bulls, cows and calves) passed by the Comptroller of Customs as imported for the purpose of stocking any ranch situate at a distance beyond 100 miles from the sea.

Chimneys or smoke-stacks imported exclusively for use in connection with any machinery exempted from duty under this schedule, also lining bricks, wire rope, and all materials which are necessary for the construction of such chimneys and smoke-stacks and are imported at the same time therewith.

Dunnage mats imported and for use in storing sugar on board outgoing vessels.

Materials used locally in the manufacture of soap and candles, viz: tallow, stearine, caustic soda, silicate of soda and rosin, passed by the Comptroller of Customs for such purpose.

Mules.

Wood and timber: (*a*) Shooks, for making puncheons, hogsheads or barrels for holding rum or molasses; (*b*) Staves and headings: White oak. Of every other description, excepting staves and headings for biscuit barrels.

Increase in Norwegian Tariff

Mr. C. E. Sontum, Commercial Agent for Canada in Christiania, writes under date of February 12: "According to a resolution passed by the Norwegian Storthing (Parliament) on February 8, the duty on all goods imported into Norway, with the exception of coffee, sugar, and such goods, the tariff on which is fixed by treaties, has been increased by 20 per cent of the amount of the present duty. If, for instance, the duty on a certain article had been 5 Norwegian kroner, it will now be 6 kroner. The increase was at once put into force."

Countervailing Duties on Pulpboard and Cement in the United States

Mr. M. M. Mahoney, representative at Washington of the Department of External Affairs of Canada, writes under date of March 2 that the United States Treasury Department has advised Collectors of Customs of the change in the Canadian tariff made January 15 in regard to "pulpboard in rolls for use in the manufacture of wall board." The new Canadian rate is 5 per cent

ad valorem under the general tariff. Under paragraph 1302 of the United States tariff provision is made for countervailing duty on this article. (See *Commercial Intelligence Journal* No. 987, December 30, 1922, p. 1049.) It is stated that the information regarding the change in the Canadian tariff is published for the use of Collectors of Customs in connection with the provision of paragraph 1302.

With regard to the countervailing duty on cement (see *Commercial Intelligence Journal* No. 980, November 11, 1922, p. 785), Mr. Mahoney writes that a circular has been sent out to United States Collectors of Customs concerning duty on the bags in which the cement is imported. Under item 291 of the Canadian tariff there is an ad valorem duty of 20 per cent on such bags. United States Collectors have been instructed that entries which had been liquidated with the assessment of this 20 per cent duty on bags were to be reliquidated without the assessment of such duty, but no refund made. Particulars of such entries, and also of entries liquidated without the 20 per cent duty on bags, were to be reported to the department. The circular now is to the effect that Collectors should no longer withhold refunds under the reliquidations directed and should discontinue reporting the particulars of entries of cement liquidated without the assessment of the 20 per cent ad valorem duty on the bags.

OCEAN MAIL SERVICES

With mails for	Steamer	Sailing from	Date
Great Britain and Countries via Great Britain.	*Montrose*	St. John	March 16
" " "	–*Melita*	"	" 17
" " "	†*President Roosevelt*	New York	" 17
" " "	–*Andania*	Halifax	" 19
" " "	†*Aquitania*	New York	" 20
" " "	†*Empress of Britain*	"	" 22
" " "	*Montclare*	St. John	" 23
" " "	†*New Amsterdam*	New York	" 24
" " "	†*Paris*	"	" 28
" " "	–*Marloch*	St. John	" 30
" " "	†*Majestic*	New York	" 31
Union of South Africa	**Jekri*	St. John	" 28
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela.	**Chaudière*	Halifax	" 16
Barbados, Trinidad, British Guiana	**Canadian Beaver*	"	" 24
Bermuda, Barbados, Trinidad, British Guiana	**Mattawa*	St. John	" 20
Bermuda, Bahamas, Jamaica, Colombia, British Honduras	**Canadian Forester*	Halifax	" 22
China and Japan	*Empress of Russia*	Vancouver	" 22
" " "	*President Jefferson*	Victoria	" 27
Australia and New Zealand	‡*Tahiti*	San Francisco	" 16
Australia only	‡*Ventura*	"	" 27
Australia and New Zealand	*Niagara*	Vancouver	" 30

† Letter mail only. * Parcel post and specially addressed correspondence only.

‡ Letter and paper mail only. – Papers, parcel post and specially addressed correspondence only.

Note.—The *Melita* will be used for direct mail for the Continent including direct Parcel Post to France.

** Postmasters will fill in hour and date of closing of mails at their offices for information of public.

FLAX CROP OF NORTHERN IRELAND

The estimated yield of the flax crop in Northern Ireland in 1922 was 25·8 stones [stone = 14 pounds] per statute acre as against 19·1 stones in 1921, writes Consul William P. Kent in the United States *Commerce Reports*. The acreage in 1922 approximated 29,100 and the yield 4,700 tons, compared with 32,432 acres and 3,867 tons in 1921.

MAILS TO WEST INDIES, CENTRAL AND SOUTH AMERICA

The Post Office Department has furnished a table of sailings from which the following information for the guidance of Canadian firms writing to the above countries has been compiled:—

Correspondence for the West Indies is forwarded by direct Canadian steamers or via New York, whichever route will give a quicker despatch, although letters marked for transmission by either route are forwarded in accordance with the endorsation.

Letters for Central America are forwarded via New York, with the exception of letters for British Honduras specially addressed "Via Halifax."

Letters for South American countries generally are also forwarded via New York, unless specially addressed "Via Halifax."

Following are sailings for the balance of the month of March:—

For	*Via*	*March*
Antigua	New York	15, 21, 29.
Argentina	New York	15, 17, 18, 24, 31.
Bahamas	New York	14, 21, 28.
Barbados	New York	15, 17, 24, 29, 31.
Bermuda	New York	14, 17, 21, 24, 28, 31.
Bolivia and Chile	New York	15, 20, 22, 24, and every Wednesday.
Brazil, North	New York	12, 13, 15, 24, 25, 26.
Brazil, South	New York	12, 13, 15, 17, 24, 25, 26, 31.
British Guiana	New York	15, 17, 21, 24, 27, 29, 31.
Colombia	New York	15, 23, 24, and every Wednesday.
Costa Rica	New York	Every Wednesday and Saturday.
Cuba	New York	15, 16, 22, 29, 30, and every Saturday.
Curacao	New York	15, 17, 22, 24, 29, 31.
Dominica	New York	15, 17, 29, 31.
Dominican Republic	New York	14, 22, 28, and every Saturday.
Dutch Guiana	New York	15, 17, 21, 24, 27, 29, 31.
Ecuador	New York	15, 20, 22, 24, and every Wednesday.
French Guiana	New York	15, 17, 21, 24, 27, 29, 31.
Haiti	New York	15, 16, 22, 23, 24, 29, 30.
Honduras	New York	15, 20, 22, 24.
Guatemala	New York	10, 24.
Jamaica	New York	16, 23, 30, and every Wednesday and Saturday.
Martinique	New York	15, 17, 29, 31.
Mexico	New York	15, 22, 29.
Nicaragua	New York	15, 20, 22, 24, and every Wednesday.
Panama and Canal Zone	New York	15, 20, 22, and every Wednesday and Saturday.
Paraguay	New York	15, 17, 18, 24, 31.
Peru	New York	12, 13, 15, 22, 24, 25, 26, and every Wednesday.
Porto Rico	New York	Every Saturday.
Salvador	New York	15, 20, 22, 24, and every Wednesday.
St. Kitts-Nevis	New York	15, 17, 29, 31.
Trinidad	New York	15, 17, 27, 29, 31.
Turk's Island	New York	14, 17, 24, 28.
Uruguay	New York	15, 17, 18, 24, 31.
Venezuela	New York	13, 15, 17, 22, 24, 29, 31.

MEXICO OFFERS SUBSTITUTE FOR JUTE

The discovery of a new fibre known as malvavisco, which is said to be a substitute for jute, is announced by the Industrial Experiment Laboratory of the Mexican Department of Commerce and Industry, says the United States *Commerce Reports*. The malvavisco plant grows abundantly in the humid level lands near the rivers and at present is employed in Vera Cruz for making brooms. Prolonged experiments have shown this plant to possess qualities similar to jute and the cost of extracting the fibre to be small. The fibre has a silky appearance and has been woven into cloth with excellent results.

JUBILEE EXPOSITION, GOTHENBURG, SWEDEN, 1923

An exhibition and fair is to be held in Gothenburg, Sweden, from the 8th of May to the 30th of September, 1923, inclusive, to commemorate the 300th anniversary of the foundation of the city, which is the principal port and ship-owning town in Sweden. The ground selected for the exhibition will cover a surface of more than 75 acres. It is intended that in its different sections the exhibition should present a vivid and comprehensive review of the historical development of the city, and the trades and arts pursued there and in other parts of the country. One of the sections of the exhibition is devoted to Swedish export industries. The exhibits in that section will demonstrate the capacity and the competitive qualities of the lines of manufacture represented, such as timber, wood pulp, matches, steel, machinery and tools. While the exhibition is in progress the 22nd General Swedish Agricultural Conference and Show will be held, at which very complete exhibits of farm produce, implements and machinery for agricultural operations will be shown.

Particulars in regard to the Gothenburg Jubilee Exposition, 1923, may be obtained on application to the Royal Swedish Consul General, 813 Drummond Building, Montreal, or direct from the Commissioners' Office at the Exhibition, Utstallningsbryan Goteborg 5, Sweden.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING MARCH 6, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement on the nominal closing quotations for all the principal exchanges for the week ending March 6, 1923. Those for the week ending February 27 are also given for the sake of comparison.

		Parity	Week ending Feb. 27, 1923	Week ending March 6, 1923
Britain .. .. £	1.00	$4.86	$4.7892	$4.7776
France .. .. Fr.	1.	.193	.0626	.0619
Italy .. .. Lire	1.	.193	.0491	.0487
Holland .. .. Florin	1.	.402	.4030	.4021
Belgium .. .. Fr.	1.	.193	.0547	.0542
Spain .. .. Pes.	1.	.193	.1592	.1583
Portugal .. .. Esc.	1.	1.08	.0445	.0445
Switzerland.. .. .. Fr.	1.	.193	.1911	.1898
Germany .. .. Mk.	1.	.238	.000044	.000045
Greece .. .. Dr.	1.	.193	.0127	.0127
Norway .. .. Kr.	1.	.268	.1887	.1851
Sweden .. .. Kr.	1.	.268	.2708	.2705
Denmark .. .. Kr.	1.	.268	.1988	.1947
Japan .. .. Yen	1.	.498	.4920	.4933
India .. .. R.	1.	2s.	.3255	.3255
United States .. .. $	1.	$1.00	1.0171	1.0171
Mexico .. .. $	1.	.498	.4984	.4996
Argentina .. .. Pes.	1.	.424	.3814	.3789
Brazil .. .. Mil.	1.	.324	.1169	.1182
Roumania .. .. Lei	1.	.198	....	....
Jamaica .. .. £	1.	4.86	4.7985	4.7947
British Guiana .. .. $	1.	1.		
Barbados .. .. $	1.	1.		
Trinidad .. .. $	1.	1.		
Dominica.. .. .. $	1.	1.		
Grenada .. .. $	1.	1.	.9911-.9936	.9936-.9987
St. Kitts .. .. $	1.	1.		
St. Lucia.. .. .. $	1.	1.		
St. Vincent .. .. $	1.	1.		
Tobago .. .. $	1.	1.		
Shanghai, China .. .. Tael	1.	.708	.7501	.7717
Batavia, Java .. .. Guilder	1.	.402	.3941	.3967
Singapore, Straits Settlements .. $	1.	.567	.5619	.5645

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

1365. Infants' Carriages.—A Bristol firm who factor in house furnishings desire quotations, and if possible samples, of babies' collapsible carriages.

1366. Chemical Products.—Established Antwerp firm desire to enter into relations with Canadian firms with a view to building up a trade in chemical products, industrial and pharmaceutical.

1367. Chemicals, Paints, Varnishes, etc.—An importer in Mexico City, with large warehouses and stock rooms, desires to obtain agencies for Canadian manufacturers of caustic soda, calcium carbide, paints, varnishes, brushes, heavy chemicals, and general merchandise.

1368. Shoe Findings, etc.—A responsible manufacturers' representative in Mexico, with good connections among the trade, wishes to secure agencies for Canadian manufacturers of leather and shoe findings of every class (including buckles, linings, laces, etc.).

1369. Woodenware.—A Bristol manufacturers' agent desires quotations from Canadian manufacturers of domestic woodenware, such as rolling pins, broom handles, and ordinary chair dowels, etc. The firm will operate only on a commission basis.

1370. Straw Brooms and Brushes.—A firm of commission agents in Trinidad, established in 1912, would like to get in touch with Canadian manufacturers of straw brooms and brushes.

1371. Wrapping Paper.—A firm of commission agents in Trinidad desire to represent a Canadian house for wrapping paper of all kinds.

1372. Stationery.—A manufacturers' representative in Mexico City, with good connections, desires to obtain agencies for Canadian manufacturers of writing papers, envelopes, pencils, and general stationery supplies.

1373. Seal and Other Fish Oils.—A London broker wishing to purchase fair quantities of Canadian seal oil and fish oils generally desires the addresses of Canadian shippers in British Columbia and elsewhere who can quote.

1374. Raw Materials for Soap.—C.i.f. prices Italian ports are required by a firm of brokers on raw material for the soap-making industry. Cash against documents, Italian currency.

BRAZILIAN BOOT AND SHOE INDUSTRY

According to the United States Consul-General at Rio de Janeiro there are at the present time no fewer than sixty factories in that city for the production of footwear, the total daily output amounting to approximately 8,500 pairs, and as very few boots and shoes are exported from Rio, this means a large local demand for the Brazilian products. On account of the heat which prevails in the central part of the Republic during the greater part of the year, the majority of men prefer oxfords, and pumps predominate in women's shoes. The women desire shoes that make the foot appear small, but recently a sharp-pointed toe was introduced which became popular. The ordinary heels on women's shoes range from 4½ to 5 centimetres. Men's shoes with sharp-pointed toes and overlapping heels were in style at the end of 1922. A moderate demand exists for sports shoes, usually of two colours of leather, tan and white, and constructed more for show than for comfort. Women's ballroom shoes, usually gold or silver, are often embroidered with bright coloured beads. Congress boots are produced in moderate quantities for sale in the interior, and other principal styles manufactured in Rio de Janeiro are Goodyear welts for men and boys, McKay sewn for men, women and children, stitch down for children and infants, strap turns for infants, and Louis XV boots for women.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From St. John

To London.—Sicilian, Canadian Pacific Steamships, Ltd., March 12; Canadian Conqueror, Canadian Government Merchant Marine, Ltd., March 14; Bolingbroke, Canadian Pacific Steamships, Ltd., March 14; Lord Dufferin, I.C. Transports, Ltd., March 20; Brecon, Canadian Pacific Steamships, Ltd., March 22.

To London (via Halifax).—Comino, Furness Line, March 20; Lexington, Furness Line, March 31.

To Manchester (via Halifax).—Manchester Division, Manchester Line, March 17; Manchester Brigade, Manchester Line, March 31.

To Liverpool.—Montrose, Canadian Pacific Steamships, Ltd., March 16; Canadian Ranger, Canadian Government Merchant Marine, March 21; Montclare, Canadian Pacific Steamships, Ltd., March 23; Marloch, Canadian Pacific Steamships, Ltd., March 30.

To Glasgow.—Concordia, Cunard-Anchor-Donaldson Line, March 14; Marburn, Canadian Pacific Steamships, Ltd., March 17; Metagama, Canadian Pacific Steamships, Ltd., March 29; Canadian Voyageur, Canadian Government Merchant Marine, April 7.

To Hull (via Halifax).—Comino, Furness Line, March 20; Lexington, Furness Line, March 31.

To Southampton.—Melita, Canadian Pacific Steamships, Ltd., March 17; Minnedosa, Canadian Pacific Steamships, Ltd., April 7.

To Belfast, Londonderry and Cork.—Melmore Head, Head Line, March 4; Ramore Head, Head Line, March 15.

To Dublin, Londonderry and Cork.—Melmore Head, Head Line, March 4; Lord Antrim, Head Line, March 25.

To Avonmouth.—Concordia, Cunard-Anchor-Donaldson Line, March 14.

To Antwerp.—Melita, Canadian Pacific Steamships, Ltd., March 17; Brecon, Canadian Pacific Steamships, Ltd., March 22; Bolingbroke, Canadian Pacific Steamships, Ltd., March 14 and April 7.

To Rotterdam.—Rathlin Head, Head Line, March 22; Lord Dufferin, I.C. Transports, Ltd., March 20.

To Havana.—A steamer, Nagle & Wigmore, March 15 and 30.

To Bermuda, Barbados, Trinidad and Demerara.—Berwyn, Canadian Pacific Steamships, Ltd., March 20 and April 7.

To Hamburg.—Melita, Canadian Pacific Steamships, Ltd., March 17; Rathlin Head, Head Line, March 22.

To Havre and Hamburg.—Essex County, I.C. Transports, Ltd., March 19; Lisgar County, I.C. Transports, Ltd., March 31; Welland County, I.C. Transports, Ltd., April 14; Hastings County, I.C. Transports, Ltd., April 23.

To Bordeaux and Dunkirk.—Grey County, I.C. Transports, Ltd., March 24.

To Australia and New Zealand.—Tredennick, New Zealand Shipping Co., Ltd., March 24.

To South Africa.—Jekri, Elder, Dempster & Co., March 31.

To Rio de Janeiro, Santos, Montevideo and Buenos Aires.—Harmodius, Houston Line, March 15; Halizones, Houston Line, April 8.

From North Sydney

To St. John's (Nfld.).—Kyle, Reid-Newfoundland Co., Tuesday, Thursday and Saturday every week; Belvernon, Tri-National SS. Corporation, March 15 and 26.
Corporation, March 15 and 26.

From Halifax

To Liverpool and Queenstown.—Andania, Cunard-Anchor-Donaldson Line, March 19; Megantic, White Star-Dominion Line, March 23; Regina, White Star-Dominion Line, April 2; Laconia, Cunard-Anchor-Donaldson Line, April 9.

To Plymouth, Cherbourg, and London.—Albania, Cunard-Anchor-Donaldson Line, March 24; Ausonia, Cunard-Anchor-Donaldson Line, April 5.

To Bermuda, British West Indies, and British Guiana.—Royal Mail Steam Packet Co., March 16 and 30, and every fortnight thereafter.

To Barbados, Trinidad and Demerara (British Guiana).—Canadian Beaver, Canadian Government Merchant Marine, Ltd., March 24.

To Australia and New Zealand.—Canadian Explorer, Canadian Government Merchant Marine, Ltd., March 20.

To Hamilton, Nassau, Kingston and Belize.—Canadian Forester, Canadian Government Merchant Marine, Ltd., March 22.

From Vancouver

To Yokohama, Kobe, Moji, Shanghai, Manila and Hong Kong.—Hawaii Maru, Osaka Shosen Kaisha, April 4; President Grant, Admiral Oriental Line, April 8.

To Yokohama, Kobe, Nagasaki, Shanghai, Manila and Hong Kong.—Empress of Russia, Canadian Pacific Steamships, Ltd., March 22.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Russia, Canadian Pacific Steamships, Ltd., March 20.

To Yokohama and Kobe.—Toyooka Maru, Nippon Yusen Kaisha, March 16; Toyama Maru, Nippon Yusen Kaisha, April 2; Hakata Maru, Nippon Yusen Kaisha, April 28.

To Yokohama, Kobe, Hong Kong and Manila.—Protesilaus, Blue Funnel Line, March 12.

To Yokohama, Kobe, Moji, Shanghai and Hong Kong.—Africa Maru, Osaka Shosen Kaisha, March 20.

To Dairen (Manchuria).—Africa Maru, Osaka Shosen Kaisha, March 20; Hawaii Maru, Osaka Shosen Kaisha, April 4.

To Honolulu, Suva, Auckland, and Sydney.—Niagara, Canadian-Australasian Royal Mail Line, March 30; Makura, Canadian-Australasian Line, April 27.

To Shanghai, Manila, Hong Kong and Singapore.—Harold Dollar, Canadian Robert Dollar Co., March 25.

To the Orient.—Canadian Highlander, Canadian Government Merchant Marine, Ltd., March 15.

To Australian Ports.—Canadian Importer, Canadian Government Merchant Marine, Ltd., March 12.

To Wellington, Lyttleton, Dunedin, Melbourne and Sydney.—Wairuna, Canadian-Australasian Royal Mail Line, March 22.

To Manchester.—Craster Hall, Isthmian Line, March 14.

To Bordeaux, Havre, Antwerp, Santander (Spain) and London.—Nevada, Compagnie Générale Transatlantique, March 20; Bordeaux, March 25.

From Victoria

To Yokohama, Kobe, Shanghai, Manila and Hong Kong.—President Jackson, Admiral Oriental Line, March 15; President Jefferson, Admiral Oriental Line, March 27.

To Yokohama and Kobe.—Kaga Maru, Nippon Yusen Kaisha, March 22.

INVOICING OF CANADIAN SHIPMENTS ABROAD: A SUGGESTION TO EXPORTERS

It is in the interests of Canadian exporters that the official trade reports of other countries should credit to Canada all imports originating in this country. Where Canadian exports are consigned to their final destination through agents in the United States or other countries they are sometimes invoiced as from the latter rather than from Canada. As a result the entry in the importing country contains no reference to the Canadian origin of the goods.

It is considered desirable therefore that Canadian exporters should instruct their agents in such cases to invoice their goods specifically as made in Canada.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 285 Beaver Hall Hill, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic.

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address, Canadian.*

Australia.

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium.

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil.

Major E. L. McColl. Address for letters—Caixa (P.O. Box) 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies.

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China.

J. W. Ross, Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba.

Address: 400 and 401 Teniente Rey 11, Havana. (Post-office Box 1290.) *Cable Address, Cantracom.*

France.

Lieut-Col. Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany.

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.

Holland.

Norman D. Johnston, Zuidblaak 26, Rotterdam. *Cable Address, Watermill.*

India and Ceylon.

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy.

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica.

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan.

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico.

C. Noel Wilde. Address for letters, Apartado Num. 126 bis, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian.*

New Zealand.

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa.

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements.

P. W. Ward, P.O. Box 121, Singapore. (Territory covers Straits Settlements, British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

A. B. Muddiman, Sun Building, Clare Street, Bristol. *Cable Address, Canadian.*

Major Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States.

Frederic Hudd, 44 Whitehall Street, New York City. *Cable Address, Cantracom.*

CANADIAN COMMERCIAL AGENTS

Australia.

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark.

C. E. Sontum, Grubbegd, No. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies.

R. H. Curry, Nassau, Bahamas.

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

Vol. XXVIII March 17, 1923 No. 998

Trade Commissioner P. W. Ward's Itinerary in Canada
United States Tariffs and Canadian Export Trade
The Wheat Situation in India: Heavy Drop in Prices
Prospects in the Wheat and Flour Trade in China
Trade of the United Kingdom by Countries in 1922
Italian Market for Various Classes of Canned Goods
Prospects for Sugar Importations in the Netherlands
Trade Inquiries for: Flour; Powdered Eggs; Apples; Chocolate; Asbestos Yarns; Lumber for Aviation; Rubber Goods; Blankets; Hardware; Water Meters

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

Printed by F. A. ACLAND, Printer to the King's Most Excellent Majesty

TABLE OF CONTENTS

Commercial Intelligence Journal

Issued Every Saturday by the Department of Trade and Commerce

Ottawa — March 17, 1923. — No. 998

TRADE COMMISSIONER P. W. WARD'S ITINERARY IN CANADA

The itinerary arranged for Mr. P. W. Ward, Canadian Trade Commissioner in Singapore, for his business tour throughout the Dominion, as formerly announced in the *Commercial Intelligence Journal,* was interrupted by his participation in the Extension Courses in Export Trade held at the University of Toronto, McGill University, and l'Ecole des Hautes Etudes Commerciales. Montreal. The rearranged itinerary is as follows:—

Kitchener	March 16.
Welland, Bridgeburg, Thorold and Niagara Falls	March 19 and 20.
Guelph	March 21.
Stratford	March 23.
London	March 26.
Chatham	March 27.
Border Cities	March 28 and 30.
Toronto	April 2.
Oshawa	April 3.
Montreal	April 4 and 5.
Sherbrooke	April 6.
Three Rivers	April 9.

Firms in Toronto and Montreal who desire to be brought in touch with Mr. Ward, or to interview him, should direct their communications to him, care of Canadian Manufacturers Association, or the Secretary of the Board of Trade, in these cities. In all other cities and towns included in the itinerary, requests for interviews should be addressed to the Secretary of the local Chamber of Commerce or Board of Trade.

INCREASED WOOL CONSUMPTION IN THE UNITED STATES

St. John Betts, Office of the Trade Commissioner in the United States

New York City, March 10, 1923.—The consumption of wool in the United States increased by over 4,000,000 pounds during January, according to the monthly report of the U.S. Department of Commerce. This was an advance of 9,000,000 pounds as compared with last year. There was an increase of over 4,000,000 pounds over the previous month in the case of wool entering into manufacturing, the total quantity for January being 54,956,160 pounds as compared with 50,754,000 pounds in December 1922 and 45,711,000 in January 1922. The consumption shown for January 1923 included 45,032,279 pounds of wool reported as in the grease, 7,626,347 pounds of scoured wool and 2,297,534 pounds of pulled wool.

The wool entering into manufacture included: 10,100,765 pounds of fine wool, 6,874,569 pounds of half blood, 9,618,578 pounds of three-eighths blood, 13,095,751 pounds of quarter blood, 1,976,128 pounds of low or Lincoln and 13,290,369 pounds of carpet wool. With the exception of the half-blood grade wool, which shows a decrease of 454,912, all grades show an increase over the previous month and in comparison with January, 1922, except in the case of fine wool which decreased slightly, over 100,000 pounds.

EXPORTS FROM CANADA TO THE UNITED STATES OF PRINCIPAL COMMODITIES SUCH AS ARE PRODUCED ON CANADIAN FARMS, OR MANUFACTURED DIRECTLY FROM SUCH FARM PRODUCTS, DURING THE MONTH AND FIVE MONTHS ENDED FEBRUARY, 1920 to 1923; WITH UNITED STATES TARIFF RATES IN FORCE.

(COMPILED BY THE EXTERNAL TRADE BRANCH, DOMINION BUREAU OF STATISTICS)

Commodities		Month of February				Five Months ended February				United States Tariff Rates in force		
		1920	1921	1922	1923	1920	1921	1922	1923	Prior to May 27, 1921	From May 27, 1921 to Sept. 21, 1922	Subsequent to Sept. 21 1922
Animals (except for Improvement of Stock)—												
Cattle	No.	13,633	5,084	1,600	6,375	299,688	169,521	105,963	104,617	...	...	...
	$	1,152,440	287,462	37,875	224,909	26,855,392	12,833,630	1,961,383	2,920,925	Free	30 p.c.	(a)
Horses	No.	155	136	138	42	1,157	1,088	1,010	640	...	...	...
	$	25,147	24,805	26,810	7,310	199,526	272,669	198,497	93,030	10 p.c.	10 p.c.	(b)
Poultry	No.	15,907	18,091	15,448	12,611	481,463	543,875	548,003	399,670	...	...	...
	$	17,539	21,498	14,580	9,564	495,124	612,995	544,106	385,234	1c. per lb.	1c. per lb.	3c. per lb.
Sheep	No.	2,732	296	8,491	442	136,347	120,253	51,848	29,272	...	...	...
	$	44,208	5,427	41,532	4,414	1,454,330	1,085,558	264,992	192,023	Free	(c)	$2 per head
Fruits—												
Apples, green or ripe	Brl.	10,196	666	126	144	175,480	11,677	392,486	61,378	...	...	...
	$	25,119	4,959	635	728	661,024	58,781	2,000,107	286,799	10c. per bush.	30c. per bush.	25c. per bush.
Apples, dried	Lb.	25,977	...	27,500	...	288,913	...	658,754	29,200	...	...	...
	$	4,939	...	2,750	...	55,339	...	76,092	2,920	1c. per lb.	1c. per lb.	2c. per lb.
Berries, fresh	$	...	3,301	6,494	5,005	31,092	28,823	45,897	57,021	½c. per qt.	½c. per qt.	1c. per lb.
Grains—												
Barley	Bush.	23,207	...	1,375	...	62,118	128	2,726	936,623	...	...	...
	$	31,310	...	688	...	80,321	128	1,566	497,645	15c. per bush.	15c. per bush.	20c. per bush.
Beans	Bush.	239	722	225	12,411	2,961	1,775	3,492	50,492	...	...	...
	$	1,513	3,014	867	41,090	14,392	7,031	10,478	151,245	25c. per bush.	$1.20 per bush	$1.05 per bush.
Buckwheat	Bush.	3,458	35,275	8,556	17,939	42,046	170,434	76,638	175,921	...	...	...
	$	6,961	41,711	7,751	14,886	61,989	198,196	61,447	144,647	Free	Free	10c. per cwt.
Oats	Bush.	397,410	213,910	223,098	15,118	1,558,998	603,138	1,238,632	152,615	...	...	...
	$	331,593	123,014	107,319	8,026	1,297,823	380,279	570,399	79,031	6c. per bush.	6c. per bush.	15c. per bush.
Pease, whole	Bush.	4,549	6,491	7,339	18,873	36,080	29,000	75,598	112,435	...	...	...
	$	36,720	39,586	27,467	57,826	235,099	178,338	238,738	272,986	10c. per bush.	10c. per bush.	60c. per bush.
Pease, split	Bush.	50	200	...	965	4,570	200	14,372	3,032	...	...	...
	$	215	576	...	2,490	14,637	576	53,892	9,507	20c. per bush.	20c. per bush.	75c. per bush.
Rye	Bush.	33,724	19,504	3,943	...	352,155	277,563	78,464	436,065	...	...	...
	$	59,398	30,861	2,813	...	520,165	455,162	63,750	334,385	Free	Free	15c. per bush.
Wheat	Bush.	126,760	4,247,652	25,157	84,550	2,017,921	37,467,310	9,218,788	8,800,876	...	...	...
	$	379,418	7,769,354	29,630	66,999	4,651,121	80,963,567	10,317,036	9,451,469	Free	35c. per bush.	30c. per bush.
Grain Products—												
Bran, shorts and middlings	Cwt.	5,335	60,690	1,876	167,179	269,628	568,565	261,086	1,296,186	...	...	...
	$	12,396	102,422	2,465	210,966	607,933	1,021,409	255,798	1,435,808	10 p.c. or Free	10 p.c. or Free	15 p.c.
Wheat Flour	Brl.	11,765	198,712	60,936	34,375	21,632	895,035	342,703	273,443	...	...	...
	$	127,468	1,759,998	348,592	225,158	239,381	9,113,836	2,073,523	1,622,679	Free	20 p.c.	78c. per cwt.
Meats—												
Bacon, hams, shoulders and sides	Cwt.	271	639	77	140	5,137	1,721	558	599	...	...	...
	$	8,190	18,634	2,527	4,375	136,514	63,561	17,623	19,993	Free	25 p.c.	2c. per lb.
Beef, fresh, chilled or frozen	Cwt.	17,703	8,957	908	1,268	171,295	128,248	99,314	78,615	...	...	...
	$	285,190	130,350	8,013	11,251	2,715,096	1,864,713	1,043,769	919,037	Free	2c. per lb.	3c. per lb.

Mutton and lamb, fresh, chilled or frozen	Cwt.	9,814	118	2,642		36,813	40,073	52,411	12,098			
	$	226,163	2,969	48,782		807,496	1,022,836	885,633	294,304	Free	2c. per lb.	(d)
Pork, fresh, chilled or frozen	Cwt.	482	312	978	431	4,280	4,467	4,581	2,785			
	$	14,433	15,271	17,842	15,306	97,412	169,336	105,771	79,360	Free	2c. per lb.	¾c. per lb.
Pork, dry-salted and pickled	Cwt.	301		6		3,445	622	331	5			
	$	8,673		108		85,855	9,795	1,917	99	Free	25 p.c.	2c. per lb.
Poultry, dressed or undressed	$	44,886	13,688	5,866	66,180	87,187	448,510	670,136	529,676	2c. per lb.	2c. per lb.	6c. per lb.
Other meats, including canned meats, but excluding extracts	Cwt.	885	1,244	187	1,401	15,458	9,030	4,056	4,377			
	$	11,635	25,834	2,426	19,933	210,134	147,917	40,924	79,607	Free	25 p.c.	20 p.c.
Milk and milk products—												
Butter	Lb.	211,434	4,660	106,004	135,199	4,345,946	1,482,663	2,593,325	2,281,698			
	$	119,995	2,422	26,158	47,103	2,420,304	744,148	950,808	936,987	2½c. per lb.	6c. per lb.	8c. per lb.
Cheese	Lb.	275,468	169,240	7,909	16,000	3,307,092	269,750	2,537,374	1,968,800			
	$	73,667	44,428	2,242	4,789	869,866	74,298	388,321	370,661	20 p.c.	23 p.c.	(e)
Cream	Gal.	16,746	21,046	46,850	56,513	217,081	354,792	652,353	489,009			
	$	26,685	35,822	60,077	125,836	365,347	579,700	953,952	920,023	Free	5c. per gal.	20c. per gal.
Milk, fresh	Gal.	125,398	45,120	91,111	69,332	887,661	429,749	545,954	391,529			
	$	40,268	13,213	22,106	17,197	277,325	137,542	128,636	89,694	Free	2c. per gal.	2½c. per gal.
Milk, condensed, including milk powder	Lb.	487,606	1,186,334		504,200	4,344,752	4,041,369	88,257	4,893,727			
	$	81,654	212,905		54,438	718,003	667,564	16,884	614,748	Free	2c. per lb.	1c.—1½c. lb.
Seeds—												
Clover seed, alsike	Bush.	5,525	7,735	19,842	6,339	74,462	26,278	71,796	28,608			
	$	160,961	103,681	181,006	43,993	1,916,203	340,495	645,547	194,191	Free	Free	4c. per lb.
Clover seed, alfalfa and red	Bush.	659		2,970	12	2,781	955	4,022	24			
	$	20,389		28,418	174	77,618	9,473	37,409	349	Free	Free	4c. per lb.
Clover seed, other	Bush.	4,899	9,596	5,533	12,615	41,428	14,724	15,239	47,036			
	$	90,912	43,753	22,591	68,045	712,984	73,464	50,644	234,262	Free	Free	(f)
Flaxseed	Bush.	103,325	19,068	55,293	220,032	359,946	814,996	1,405,752	1,487,968			
	$	505,509	36,787	98,341	478,090	1,730,822	1,714,695	2,616,009	3,117,218	20c. per bush.	30c. per bush.	40c. per bush.
Grass seed	Bush.	3,350	28,730	8,654	11,364	22,024	61,314	52,865	45,340			
	$	13,389	59,771	39,268	22,090	80,600	127,160	222,455	86,747	Free	Free	2c. per lb.
Vegetables—												
Potatoes	Bush.	293,527	108,413	276,567	7,423	2,954,811	1,436,773	833,352	204,418			
	$	565,927	72,293	187,991	6,495	3,630,997	1,262,488	666,974	168,284	Free	25c. per bush.	50c. per cwt.
Sugar beets	Ton.					7,723	11,502	10,481	11,430			
	$					70,235	103,175	63,151	56,730	5 p.c.	5 p.c.	80c. per ton
Turnips	Bush.	239,981	171,967	134,736	148,347	1,786,053	1,499,438	1,451,067	1,607,485			
	$	142,285	40,786	35,988	19,917	796,537	360,608	387,313	224,773	15 p.c.	15 p.c.	12c. per cwt.
Miscellaneous Products—												
Eggs	Doz.	1,163	1,275	462	255	70,173	134,213	110,689	70,566			
	$	849	759	199	125	44,342	87,741	53,262	30,037	Free	Free	8c. per doz.
Hay	Ton	15,591	5,303	319	2,018	85,069	42,531	853	5,993			
	$	284,374	114,109	9,023	25,262	1,403,678	955,799	20,931	68,629	$2 per ton	$2 per ton	$4 per ton
Maple sugar	Lb.	19,340	260,360	194,920	7,566	730,850	1,167,235	1,208,422	122,312			
	$	5,318	50,001	16,098	1,440	212,733	276,843	89,342	28,160	3c. per lb.	3c. per lb.	4c. per lb.
Tallow	Cwt.	382	2,778	365	2,101	17,474	8,891	8,503	4,795			
	$	6,180	13,558	1,733	16,506	275,596	61,473	46,775	35,400	Free	Free	½c. per lb.
Wool	Lb.	247,051	397,035	22,417	163,914	2,432,066	4,961,686	129,872	3,712,028			
	$	151,931	85,603	3,553	46,318	1,470,724	1,187,053	14,167	1,132,971	Free	(g)	(g)
Total value of above commodities	$	5,145,847	11,354,631	1,478,624	1,974,234	58,688,296	119,701,345	28,856,054	28,169,294			

(a) Cattle weighing less than 1,050 pounds, 1½c. per lb.; 1,050 pounds or over, 2c. per lb. (b) Horses valued at not more than $150 each, $30 per head; more than $150 each, 20 per cent. (c) Sheep, one year old or over, $2 per head; less than one year old, $1 per head. (d) Mutton fresh, 2½c. per lb.; lamb, fresh, 4c. per lb. (e) Cheese, 5c. per lb. but not less than 25 per cent (f) Clover seed, crimson, 1c. per lb.; white, 3c. per lb. and other, 2c. per lb. (g) Dutiable at various rates. See *Commercial Intelligence Journal* No. 974, Sept. 30, 1922, pages 516-7.

THE WHEAT SITUATION IN INDIA

Trade Commissioner H. A. Chisholm

Calcutta, February 2, 1923.—The first official wheat forecast now completed for the season 1922-23, and based on reports received from districts comprising 98 per cent of the total wheat acreage of India, reveals that the total area sown to wheat is estimated at 29,511,000 acres as compared with 27,932,000 acres at this time last year. As compared with the revised final acreage of last year, the present estimate shows an increase of 5 per cent.

The yield per acre is expected to be high, as the rainfall precipitated over the wheat-growing districts of Central and Northern India during the germination months of September and October was from 20 per cent to 30 per cent in excess of normal. Unless the growing crop is adversely affected in February-March, it is expected that the yield should be over 10,000,000 long tons as compared with 9,813,000 long tons, which was 600,000 tons in excess of the average for the preceding five years. Indian prices continue to drop and an additional volume of Indian wheat is becoming available for export.

INDIA NOW EXPORTING WHEAT

It was stated in *Commercial Intelligence Journal* No. 974 (September 30, 1922) that, as soon as the 1923 season showed indications of a good yield, India would begin to export wheat. During 1921 and the first few months of 1922 India was an importer of wheat. In August, September and October of last year a balance was reached during which months India neither imported nor exported wheat. In November the export movement was commenced with shipments abroad of some 41,000 long tons. This was continued in December, and 35,000 tons were exported from Karachi during the week ending December 23. During January, 1923, the exports to foreign countries from Karachi have averaged from 8,000 to 10,000 tons weekly, nearly all of which is destined for the United Kingdom and Egypt. Of the 58,000 tons exported in December, 38,000 tons went to the United Kingdom, 12,600 to Egypt, 1,700 tons to Belgium, and 2,000 tons to Italy. The total values of these December shipments were in the vicinity of $3,000,000. An additional volume of Indian wheat is becoming available for export.

HEAVY DROPS IN INDIAN WHEAT PRICES

As soon as the embargo on the export of wheat was removed by the Government of India in September, 1922, Indian wheat prices began to drop rapidly. In August, 1922, the average prices at Karachi were around rs. 9 or $2.70 per cwt. In October prices had dropped to an average of rs. 8/8/- per cwt., in December to rs. 8/- and this month to a little over rs. 6/- or about $1.90 per cwt. for a wheat described as follows: Punjab white, 5 per cent barley, 3 per cent dirt and 30 per cent red.

HAY MARKET PROSPECTS IN ENGLAND

Mr. Harrison Watson, Canadian Trade Commissioner in London, England, writes under date February 27, 1923, that an English correspondent advises him in connection with the present demand for hay as follows: "Demand for Canadian hay is quiet except for No. 3 timothy for contract purposes. Clover mixed if genuine would be saleable if it could be laid down at about £6 per ton London, which appears to have been the standard price all along. United States exporters have started sending hay to Liverpool and London, but the quality is not very good."

PROSPECTS IN WHEAT AND FLOUR TRADE WITH CHINA

Assistant Trade Commissioner G. A. Rolf Emery

Shanghai, February 5, 1923.—From and including the Yangtze Basin, South China's cereal crop is chiefly rice. North of the Yangtze wheat is the chief cereal grown. As a result of the peculiar physical conditions which bring about such a division of crops, the south has been a steady user of Canadian flour for the last twenty years. In the north, however, crop conditions have played a vitally important part in determining the amount of foreign wheat and flour imported.

CONDITIONS OF CROP

The last three years have been difficult ones for the farmers in the north. Drought followed by floods and succeeded by another drought have had such a harmful effect upon the crops that northern China has been forced to import flour and wheat in larger quantities within the last six months than for some years. Rice has been steadily advancing in price, and this season, for the first time in twenty years, Shanghai has had to import 30,000 tons of rice from Saigon.

Whether such conditions will continue depends to a large extent upon the weather. The last four months have been exceptionally dry with only one small rainfall and two light snow flurries. January, which is usually a rainy month, has only had one slight snow flurry hardly sufficient to moisten the soil. The next normally wet month is not due until June, when the wheat will have been harvested. Unless rain comes in the next two months, which are usually dry, every indication points to a bad wheat crop in northern China. If the present conditions last, China will again be forced to import foreign flour in larger quantities than this past season. Of course such a continued demand upon the products of Canadian flour mills depends to a large extent on the weather conditions in northern China and the price of Canadian flour.

CANADIAN FLOUR USED FOR MIXING

Nearly all the Canadian flour imported into Shanghai in the past six months has been shipped north. There it is used for many purposes such as in the manufacture of noodles, macaroni, bread mixtures, etc. The Chinese are using the Canadian flour, with its high percentage of gluten, for mixing purposes. The body in the Canadian flour when blended with the Chinese flours seems to make a better product than if the Chinese flours were used alone. Further, the northern Chinese, through their growing of wheat and grains and the development of their flour-milling industry, are using greater quantities of bread and cake mixtures. Again, north of the Yangtze rice is too expensive for the average. These facts seem to portend a greater familiarity with bread mixtures in the future, and as a consequence a more steady demand for flour which the Canadian mills should be called upon to supply in increasing quantities.

EUROPEAN COAL SHORTAGE

The effect of the French action in the Ruhr is more widespread in Europe than was anticipated even by those who realize how intimately connected are the various branches of international trade, says the London *Times Trade Supplement*. Naturally coal, iron, and steel are the commodities that have been most influenced. The past week has seen no cessation of the demand for fuel from either France, Belgium, or Italy. Gas coal is now being sent from Asturias to Italy, while an initial shipment of South African fuel is being made to Germany. Czecho-Slovak metal industries are receiving some of the orders that their western neighbours are unable to accept, and Swedish together with Finnish steel manufacturers confidently expect to benefit by the waning of German competition.

TEA PRODUCTION IN INDIA

Trade Commissioner H. A. Chisholm

Calcutta, January 20, 1923.—The figures used in this article are for the most part taken from the 27th Report on *The Production of Tea in India,* published this month by the Government of India dealing with production during the calendar year 1921 and export figures during the fiscal year ending March, 1922.

GROWTH IN AREA AND PRODUCTION

The area under tea in India has shown a steady and uninterrupted growth during the last half century. During the five years 1885-89 the average area under tea was 310,000 acres, which had increased to 524,000 acres in 1900, 563,000 in 1910, 613,000 in 1913, and 709,000 acres in 1921. Production, which stood at 90,000,000 pounds in 1885, had increased to 200,000,000 pounds in 1900, 307,000,000 pounds in 1913, and 380,000,000 pounds in 1918. The post-war years showed declines from this high-water mark down to 274,000,000 pounds in 1921.

PRICE VARIATIONS

The restricted output of Indian teas of 1921 and 1922 resulted largely from concerted action on the part of the planters. Owing to the accumulation of old stocks and the absence of Russian buyers, production had overtaken demand and the planters came to the decision that short crops were of paramount importance to the prosperity of the industry. Accordingly "fine plucking" was generally resorted to. Other circumstances also combined to limit the output, and the season of 1921-22 ushered in an era of exceptionally fine quality teas accompanied by high prices. The average price realized at the Calcutta tea auctions during the season was in excess of 10 annas (20 cents) per pound, as compared with an average of 5 annas (10 cents) per pound in 1921, 8 annas in 1918-19, and a pre-war average of from 6 to 7 annas. While 1920-21 created a record for low prices, 1921-22 created a record for high prices. Therefore, in spite of low production and high working costs, most of the Indian tea gardens are showing handsome profits, and the industry is once more sound and prosperous.

DESTINATION OF EXPORTS

Some 80 to 85 per cent of India's total exports of tea go to the United Kingdom. According to the Indian Government statistics, during the calendar year 1921, the United Kingdom imported 285,000,000 pounds of Indian teas, while Canada, India's second best tea customer, took only 14,000,000 pounds, the United States 10,000,000 pounds, and Australia and New Zealand 9,300,000 pounds. These figures include the quantities re-exported from the United Kingdom. In 1920 over 16,000,000 pounds of Indian teas were re-exported from the United Kingdom, Canada being the largest buyer with 3,687,000 pounds of this total, and the United States 3,271,000 pounds, while most of the remainder went to Continental Europe.

THE DISAPPEARANCE OF THE RUSSIAN MARKET

Before the war Russia imported an average of nearly 30,000,000 pounds of Indian teas annually and was by far India's second best customer. During the war the annual average was 18,400,000 pounds. In 1920 the direct trade

in Indian teas to Russia had dropped to 20,000 pounds, and in 1921 to nil. Apparently the only Indian teas now reaching Russia are through re-export from the United Kingdom, and in 1920 this figure was only 246,000 pounds as compared with from 5,000,000 to 6,000,000 pounds annually before the war.

INDIA'S COMPETITORS IN THE WORLD'S TEA MARKETS

While Indian teas are holding their own in the world's greatest tea market, the United Kingdom, there are indications that Java may become a competitor not to be despised. The growth of tea exports from the leading producing countries is shown by the following table with variations (shown within parentheses) in index numbers, taking the figure for 1896-97 as 100:—

TEA EXPORTS FROM INDIA, CEYLON, CHINA, AND JAVA (1896-1922)

Year	India Lbs.	Ceylon* Lbs.	China† Black and Green Lbs.	China† Black, Tablet and Dust Lbs.	Java† Lbs.
1896-97..	150,421,245 (100)	110,095,194 (100)	161,538,933 (100)	78,567,333 (100)	....
1905-06..	216,770,366 (144)	171,256,703 (156)	112,152,533 (69)	70,784,267 (91)	25,650,156 (100)
1912-13..	281,815,329 (187)	186,632,380 (169)	127,826,800 (79)	69,733,200 (89)	61,691,452 (241)
1919-20..	382,033,694 (254)	208,560,943 (189)	71,801,200 (44)	20,182,400 (26)	110,792,430 (432)
1921-22..	317,566,850 (211)	161,610,966 (147)	53,892,533 (33)	3,484,633 (4)	67,805,955 (264)

* The figures for years previous to 1905-06 and also from 1917-18 to 1920-21 relate to the calendar year.
† For calendar year.

These figures show that Java has now displaced China in third place among the world's tea-exporting countries, and has shown the greatest percentage of growth. In twenty-five years China's tea exports have declined from a position almost equal to India's to a total in 1921-22 of only 20 per cent of India's total exports. India is now responsible for about half of the world's direct tea exports, whereas prior to the war only 30 to 40 per cent of the world's total exports were of Indian teas.

GROWTH OF JAVA TEAS

While Australia's imports of Indian teas remain stationary, imports of Java teas have increased, chiefly at the expense of Ceylon, from some 10 per cent of the total in pre-war years to over 40 per cent of the total imported into Australia in 1921. Imports of Java teas into the United States have grown from practically nil before the war to nearly 6,000,000 pounds in 1921. The United Kingdom's imports of Java teas in 1921 were more than double the average pre-war figure of 18,000,000 pounds. Canada's imports of Java teas in 1921 are apparently almost negligible.

India's share of the total tea trade of the United Kingdom in 1921 was 64 per cent as against 54 per cent as the pre-war average; of Canada, 60·7 per cent as compared with 37·2 per cent; of the United states, 13 per cent as compared with 5 per cent; and of Australia, 18 per cent as compared with 22 per cent. Indian teas have therefore made considerable headway in the United Kingdom, Canada, and the United States, while they have lost ground in Australia.

CAPITAL EMPLOYED

The capital of joint-stock companies engaged in the production of tea in India in 1921 amounted to over £28,000,000, of which £22,700,000 represented companies incorporated in the United Kingdom. The positions of ten typical tea estates for which data are available for several years show that the average dividends on the ordinary paid-up capital amounted in 1913 to 25 per cent, in 1918 to 45 per cent, in 1920 to 16 per cent, and in 1921 to 23 per cent.

INDIAN RAILWAY DEFICIT FOR THE YEAR 1921-22

Trade Commissioner H. A. Chisholm

Calcutta, February 7, 1923.—For the first time since the year 1900, Indian railways, instead of being a source of revenue to the Government of India, proved to be a liability during the fiscal year ending March, 1922. The recently published *Administrative Report on Railways in India for the Year 1921-22* shows that the gross earnings of all the Indian railways during the year amounted to about 93* crores of rupees, of which the share of the Government of India was about 82 crores of rupees as compared with total charges of over 91 crores, leaving the Government of India with a net deficit of 9¼ crores for the year.

Nearly all the Indian railways are government-owned and about 30 per cent of the total mileage is operated by the Government. During the last twenty-two years the Indian railways have contributed in net profits to the Government of India over $300,000,000, and the annual return during the last ten years on capital invested had never gone below 4¾ per cent and had been as high as 7½ per cent. On the other hand, 1921-22 showed a return on capital of only 2¼ per cent. The unprecedented deficit represented by this low return seriously aggravates the financial problems now facing the Government of India.

In their report the Railway Board, while not attempting to minimize the serious significance of this deficit, point out that "it is certainly unjustifiable on the facts to take these results as any true criterion of future possibilities of railways and to make them the basis of the conclusion, as had been sometimes done in the public press, that railways had ceased to be a paying proposition or that the poor results are due to faults in the administration. The fact of the matter is that railways are suffering from the natural result of a combination of unfavourable economic factors which have similarly affected every form of business in the country and in fact in the world. Working expenses have risen to an unprecedented degree, and the earning power of the lines has not responded for the reason that trade was almost at a standstill."

INCREASED EXPENDITURE ON MAINTENANCE AND RENEWALS

While gross earnings showed a slight increase over the previous year, the percentage of expenses to gross earnings rose from 65·55 per cent in 1920-21 to 76·22 per cent in 1921-22. Detailed statistics show that the greater proportion of this increase was absorbed by additional expenditure on maintenance and renewals of way, works and equipment. Renewals of rails, sleepers, bridges and rolling stock were exceptionally heavy, while the cost of labour and coal was much higher than in any previous year. It is expected that the present year will show lower costs in all these items.

PURCHASE OF RAILWAY MATERIALS

Over 38½ crores of rupees were spent during the year in purchases of materials, of which 27·8 crores were spent for imported materials and 10·7 crores for Indian materials. Over 15 crores were spent in the purchase of rolling stock, of which 1½ crores were spent in India, mostly on railway carriages manufactured by the Indian Standard Wagon Company. This plant has a maximum output of 3,000 wagons per year and is well equipped with modern machinery. Wheels and axles are the only wagon parts which are not manufactured on the spot.

* A crore of rupees is equal to roughly $3,000,000. A lakh of rupees is equal to roughly $30,000.

No locomotives are yet manufactured in India, but it is now understood that at least one firm is erecting a locomotive manufacturing plant in India.

Tools and Stores.—Total purchases of these supplies amounted in value to 13·34 crores of rupees, of which 2·11 crores represented the value of materials imported direct, 6·14 crores the value of imported stores purchased in India, and 5 crores the value of articles manufactured in India. India has made considerable headway in recent years in her ability to supply railway tools and stores within the country.

Rails and Fastenings.—A few years ago India imported nearly all her rails, but now the majority of the rails used by the Indian railways are manufactured in the great Tata plant. Of the 2·82 crores of rupees spent on rails and fastenings, 1·19 crores represent materials manufactured in the country and 1·63 crores materials imported from abroad.

Sleepers.—Some 3·83 crores of rupees were spent on sleepers, of which 2·65 crores represent the cost of wooden sleepers and 1·19 the cost of metal sleepers. Of the former figure nearly 90 per cent represents the cost of sleepers made of Indian woods, and the remainder the cost of 300,000 sleepers imported from the Pacific Coast of North America. Metal sleepers worth 77 lakhs of rupees were imported, and similar sleepers to the value of 42 lakhs of rupees were manufactured in India.

An increasing proportion of the purchases of Indian railways is being made in India by the Indian Stores Department, which had hitherto been purchased in London through the Indian High Commissioner's office. As a result larger stocks of imported railway supplies are being kept in India, and more European manufacturers have opened their own offices in India or have arranged direct representation. The Indian railways will be spending around $100,000,000 a year for several years in rolling stock and equipment. While the United Kingdom manufacturers will secure the bulk of this business, United States manufacturers are making stronger efforts at securing a foothold. If Canadian manufacturers of railway equipment of any kind are in a position to handle business in the East, no time should be lost in making a bid for a share in this great market.

THE BRITISH INDUSTRIES FAIR

Trade Commissioner Harrison Watson

London, February 23, 1923.—The ninth British Industries Fair shows practically no deviation from its immediate predecessor. The location is the same—the White City, Shepherds Bush—and the sections are identical, namely:—

(*a*) Chemicals (heavy and fine), Chemical Plant, Dyes.
(*b*) Scientific, Optical, and Musical Instruments.
(*c*) Sports Goods.
(*d*) Toys and Games.
(*e*) Watches and Clocks, Jewellery, and Silverware.
(*f*) Furniture.
(*g*) China and Earthenware, Glass and Glassware.
(*h*) Foodstuffs and General.
(*j*) Office Appliances, Paper, Printing, Publishing and Stationery.
(*k*) Leather and Leather Goods, Fancy Goods and Brushware.

The interesting feature of the present fair, from a Canadian point of view, is the introduction for the first time of a Canadian section. This was organized

by the Canadian Chamber of Commerce in London, and if the resulting display is a modest one, it is due to no lack of enterprise and energy upon the part of the chamber. The Board of Trade has, moreover, met the organizers in every possible way, in so far that they have not only permitted a departure from the system of trade group display, but have allowed the introduction into the Canadian section of a variety of products which are quite outside of the scope of the fair. It is understood that the chamber was unable to secure any exhibits from Canada, and that they had to fall back upon the United Kingdom representatives of Canadian firms, and even then encountered several disappointments at the last moment.

The space allotted to the Canadian section is located in a favourable position close to one of the principal entrances, and although the area is small and there are only six stands occupied by individual firms, the number of Canadian manufacturers participating assumes considerable dimensions owing to the Canadian National Railways and the Canadian Chamber of Commerce including in their displays one or more articles supplied by Canadian manufacturers who have not leased stands themselves. The list is as follows:—

R. Lehmann & Co., Ltd., London, showing condensed milk manufactured by the Laing Produce and Cold Storage Co., Ltd., Brockville, Ont.

Shredded Wheat Co., Ltd., London and Niagara Falls, showing shredded wheat.

V. K. Manufacturing Co., Ltd., London, showing evaporated milk manufactured by the Pacific Milk Co., Ltd., Vancouver.

James Latham, Ltd., London, showing fibre mouldings made by J. Walter & Sons, Ltd., Kitchener, Ont.

J. T. B. Sweetman & Son, Toronto and London, showing "Silvershine" (a metallic plate for cleaning silverware).

A. G. Johnstone, London, showing shoes made by the Blachford Shoe Manufacturing Co., Ltd., Toronto.

Canadian National Railways, showing:—
- Soap and soap flakes—Palmolive Co., Ltd., Toronto.
- Whisky—Hiram Walker & Sons, Ltd., Walkerville.
- Suspenders—Eisman & Co., Ltd., Toronto.
- Canned salmon—Maritime Fisheries, Ltd., Vancouver.
- Dry cells—Canadian National Carbon Co., Ltd., Toronto.
- Face cream and powder—Florien & Armand, Ltd., St. Thomas.
- Corn flakes—W. K. Kellogg Cereal Co., Hamilton.

Canadian Chamber of Commerce in London, showing:—
- Canoes—Peterborough Canoe Co., Ltd., Peterborough.
- Wallpaper—Stauntons Ltd., Toronto.
- Ladders—Beatty Bros., Ltd., Fergus.
- Glass bottles—Dominion Glass Co., Ltd., Montreal.
- Pipe cleaners—Canadian Chenile Co., Toronto.
- Moccasins—Shown by A. B. Minelli, London.

Canadian Pacific Railway Company—Model steamer, pictures, etc.

Manchester Liners, Ltd.—Models of ships.

In addition to the above, however, there are several Canadian manufacturers making displays in the particular trade section with which they are associated. These include:—

Gillette Safety Razor Co., Ltd., Toronto—Safety razors.

A. Boake Roberts & Co., London, showing acetic acid made by the Canadian Electro Products Co., Ltd., Shawinigan, and carbon black made by the Canada Carbide Co., Ltd., Shawinigan.

Canadian-American Machinery Co., Ltd., London, showing printing machinery.

There may be others, but as it occasionally happens that the display is made by the United Kingdom agent in the stand which bears his name, and not in that of the Canadian manufacturer, it is a difficult matter to trace all Canadian exhibits in such a vast assembly, even with the aid of the catalogue

Were it not for the fact that the present display in the Canadian section consists almost entirely of commodities which are altogether outside of the real scope of the fair, it would be interesting to compare the results achieved by a collective exhibit with those secured by other displays which are grouped according to the classification adopted by the British Industries Fair based upon the early experience of the Leipzig and similar trade fairs, because it will be observed that several Canadian firms have adopted the previous habit of showing in their own trade section. The general impression in this country is that the sectional system is of superior practical value in a purely business exhibition in that the visiting buyer finds all the displays of the trade or industry in which he is interested located together, which enables him to despatch his business with the least possible trouble and loss of time. The probability is that the collective system is the better for propaganda and the group method for selling purposes.

In spite of the considerable business depression still prevailing, it is officially announced that the attendance of visitors to the fair has so far been satisfactory, and that the volume of inquiries is in excess of last year. Quite a number of valuable orders have been placed by home and overseas buyers, the latter including several from the United States and Canada.

Although practically every feature of the fair and its organization has been dealt with in previous reports, it seems well to repeat that admission is limited to business firms, and is by invitation, and that the Board of Trade announces that 250,000 tickets were issued in advance in connection with the present fair, a number which is substantially increased by applications during the time it is open.

TRADE OF THE UNITED KINGDOM BY COUNTRIES IN 1922

Trade Commissioner Harrison Watson

London, February 16, 1923.—Figures showing the trade, by valuation, with the principal countries of the world in 1922 have now been issued, and possibly the most noticeable feature is that in the majority of cases the totals show very slight variations from those of the preceding year, although of course there was some decline in prices between the two years.

So much has been recently said by public men, and also written, recommending that former markets now lost, at least temporarily, to this country and the Empire generally by the world's disorganization should be replaced by increased trade within the British Empire itself, that one looks with special interest at the results of last year's trading to see what 1922 brought forth in this direction. It will be disappointing to find that progress was, at the best, at a standstill.

Comparing the totals of transactions within the Empire with those conducted with foreign countries, it is learned that the proportion of imports from Empire countries in 1922 was 32 per cent of the whole, as against 31 per cent in 1921. Exports from the United Kingdom to the countries forming the Empire, on the other hand, dropped to 40 per cent from 42 per cent in 1921. In the case of Canada, the general result was markedly reversed, because there was a decrease of approximately £7,000,000 in the value of Canadian products imported—due almost entirely to the heavy fall in the values of grain, flour, and other foodstuffs—while exports of British goods to Canada augmented by almost £6,000,000. As trade with the United States followed a similar direction, although the proportionate falling-off in the value of imports was still greater, it appears probable that the course of business was affected by

exchange in both cases. It is also worth noting that trade with Germany increased about 20 per cent in value, and that exports of British products to Germany nearly doubled, although re-exports fell away considerably.

TABLE SHOWING TRADE OF THE UNITED KINGDOM—I.E., IMPORTS, EXPORTS (THE PRODUCE OF THE UNITED KINGDOM), AND RE-EXPORTS (THE PRODUCE OF FOREIGN COUNTRIES AND OTHER PORTIONS OF THE BRITISH EMPIRE), WITH THE COUNTRIES INDICATED, FOR THE CALENDAR YEARS 1920, 1921 AND 1922.

	1920 £	1921 £	1922 £
Canada—			
Imports..	92,999,215	61,975,446	54,895,290
Exports..	42,692,777	19,458,990	25,271,213
Re-exports..	6,067,042	2,068,917	2,663,663
Total..	141,759,034	83,503,353	82,830,166
Australia—			
Imports..	112,287,802	68,069,954	64,863,155
Exports..	62,574,445	45,636,741	60,457,294
Re-exports..	5,771,988	2,784,249	5,274,912
Total..	180,634,235	116,490,944	130,595,361
New Zealand—			
Imports..	47,492,889	48,735,661	48,521,709
Exports..	26,628,235	14,889,289	15,868,025
Re-exports..	1,350,883	580,093	832,788
Total..	75,472,007	64,205,043	65,222,522
Union of South Africa—			
Imports..	19,081,913	18,670,676	16,151,734
Exports..	49,075,915	29,858,543	24,515,382
Re-exports..	2,632,918	1,206,811	1,284,387
Total..	70,790,746	49,736,030	41,951,503
West Africa—			
Imports..	30,569,797	10,816,176	9,759,633
Exports..	23,330,553	12,562,894	11,650,049
Re-exports..	2,065,832	824,412	910,839
Total..	55,966,182	24,203,482	22,320,511
British West Indies—			
Imports..	14,302,807	6,021,734	4,437,094
Exports..	5,934,823	3,763,382	3,462,382
Re-exports..	543,575	453,632	491,784
Total..	20,781,205	10,238,748	8,391,260
British India—			
Imports..	95,721,420	44,307,742	47,680,603
Exports..	181,239,634	108,868,548	91,621,301
Re-exports..	2,712,081	2,535,298	1,317,659
Total..	279,673,135	155,411,588	140,619,563
Ceylon—			
Imports..	16,803,315	10,683,006	10,322,084
Exports..	6,386,843	3,949,940	3,581,159
Re-exports..	209,090	83,235	91,667
Total..	23,399,248	14,716,181	13,994,910
Straits Settlements—			
Imports..	17,930,539	7,269,472	7,961,142
Exports..	16,599,545	8,430,115	6,643,620
Re-exports..	339,028	150,778	80,543
Total..	34,869,112	15,850,365	14,685,305

TABLE SHOWING TRADE OF THE UNITED KINGDOM, ETC.—*Continued*

	1920 £	1921 £	1922 £
Egypt—			
Imports	69,331,895	26,922,589	31,106,420
Exports	43,643,665	18,884,073	15,562,145
Re-exports	1,178,852	384,766	317,661
Total	114,154,412	46,191,428	46,986,226
France—			
Imports	75,836,422	53,013,656	48,619,813
Exports	135,936,295	44,259,945	48,310,485
Re-exports	39,811,448	12,805,071	17,627,938
Total	251,584,165	110,078,672	114,558,236
Belgium—			
Imports	44,925,208	32,861,826	23,657,200
Exports	49,037,764	19,629,388	24,831,348
Re-exports	19,487,918	9,653,922	10,648,176
Total	113,450,890	62,145,136	59,136,724
Italy—			
Imports	17,880,532	8,890,894	11,282,160
Exports	39,701,777	16,937,718	19,257,227
Re-exports	5,624,454	1,723,894	1,725,054
Total	63,206,763	27,552,506	32,264,441
Germany—			
Imports	30,251,806	20,513,801	26,524,477
Exports	21,706,660	17,861,350	32,075,692
Re-exports	29,382,103	22,849,863	16,985,766
Total	81,340,569	61,225,014	75,585,935
Sweden—			
Imports	56,467,716	21,590,868	19,200,968
Exports	39,327,598	9,622,916	12,291,611
Re-exports	5,005,318	1,892,817	1,524,843
Total	100,800,632	33,106,601	33,017,422
Norway—			
Imports	23,819,349	10,317,093	10,565,805
Exports	33,399,353	14,574,243	11,589,217
Re-exports	2,083,008	785,070	714,269
Total	59,301,710	25,676,406	22,869,291
Netherlands—			
Imports	39,253,702	38,834,343	34,197,863
Exports	47,699,350	27,341,144	34,903,266
Re-exports	14,439,083	9,122,888	5,997,225
Total	101,392,135	75,298,375	75,098,354
Denmark—			
Imports	31,165,965	41,365,144	40,309,506
Exports	30,583,167	10,033,658	12,451,767
Re-exports	4,400,756	1,413,815	1,247,767
Total	66,149,888	52,812,617	54,009,040
Switzerland—			
Imports	36,996,066	19,951,818	21,707,273
Exports	12,610,512	5,537,520	9,809,696
Re-exports	2,853,144	1,047,020	1,301,075
Total	52,459,722	26,536,358	32,818,044
Greece—			
Imports	6,815,805	4,034,230	4,012,911
Exports	12,783,304	5,876,761	3,795,658
Re-exports	511,074	261,307	67,271
Total	20,110,183	10,172,298	7,875,840

TABLE SHOWING TRADE OF THE UNITED KINGDOM, ETC.—*Continued*

	1920	1921	1922
	£	£	£
Spain—			
Imports	37,296 827	22,097,977	18,732,928
Exports	19,273,065	13,510,204	11,990 049
Re-exports	3,401,158	703,527	962,887
Total	59,971,050	36,311,708	31,685,864
Portugal—			
Imports	6,899,451	4,166,830	4,588 915
Exports	10,555,303	3,373,354	4,218,917
Re-exports	1,496,373	748,931	479,684
Total	18,951,127	8,289,115	9,287,516
Russia—			
Imports	33 522,892	2,694,674	8,176,002
Exports	11,992 083	2,181,007	3,678 525
Re-exports	4 841,300	1,210,283	1,038,473
Total	50,356,275	6,085,964	12,893,000
Austria—			
Imports	....	703,039	1,582,404
Exports	....	1,734,041	1,038 288
Re-exports	....	407,857	412,207
Total	....	2,844,937	3,032,899
Hungary—			
Imports	....	87,653	409,535
Exports	....	300,393	204 982
Re-exports	....	26,761	27,518
Total	....	414,807	642,035
Roumania—			
Imports	3,231,892	3,390,567	1,695,481
Exports	7,112,462	5,798,593	2,636,449
Re-exports	390,743	129,742	52,021
Total	10,735,097	9,318,902	4,383,951
Turkey—			
Imports	12,092,253	1,063 669	1,736 500
Exports	31,321,555	4,719,326	3,696 291
Re-exports	1,088,021	99,176	143,235
Total	44,501,829	5,882,171	5,576,026
Czecho-Slovakia—			
Imports	....	5,703,149	5,226,264
Exports	....	1,317,696	744,457
Re-exports	....	1,415,794	304,185
Total	....	8,436,639	6,274,906
Serb-Croat-Slovene State—			
Imports	....	764,851	643,952
Exports	....	1,048,439	665,634
Re-exports	....	27,640	18,796
Total	....	1,840,930	1,328,382
United States—			
Imports	563,326,962	274,750,124	222,012,994
Exports	77,118,879	43,988,648	55,022,435
Re-exports	53,942,116	20,319,686	21,654,309
Total	694,387,957	339,058,458	298,689,738
Argentine—			
Imports	128,046,279	68,369,725	56,520,259
Exports	42,921,254	27,626,234	22,708,073
Re-exports	920,397	427,461	655,884
Total	171,887,930	96,423,420	79,884,216

TABLE SHOWING TRADE OF THE UNITED KINGDOM, ETC.—*Concluded*

	1920 £	1921 £	1922 £
Brazil—			
Imports	12,025,378	5,883,046	7,726 337
Exports	24,289,414	10,384,657	10,983,059
Re-exports	604,583	217,916	275,768
Total	36,919,375	16,485,619	18,985,164
Peru—			
Imports	14,619,312	6,441,400	7,410,115
Exports	4,733,352	2,149,060	1,748,949
Re-exports	100,601	31,665	61,974
Total	19,453,265	8,622,125	9,221,038
Chile—			
Imports	12,942,932	6,489,415	4,421,848
Exports	9,661,998	5,120,710	5,437,117
Re-exports	222,103	90,678	141,431
Total	22,827,033	11,700,803	10,000 396
Mexico—			
Imports	13,444,493	9,859,235	8,603 846
Exports	4,344,402	4,590,021	2,212,607
Re-exports	221,805	125,670	87,809
Total	18,010,700	14,574,926	10,904,262
Cuba—			
Imports	26,184,460	6,488,329	10,610,400
Exports	7,249,917	1,898,277	1,388,137
Re-exports	149,302	592,198	511 347
Total	33,583,679	8,978,804	12,509,884
China—			
Imports	26,898,466	11,269,717	9,723,070
Exports	43,577,342	26,218,760	23,734,102
Re-exports	393,040	185,947	160,774
Total	70,868,848	37,674,424	33,617,946
Japan—			
Imports	29,699,321	8,761,769	8,440 129
Exports	26,093 293	21,434,006	23,974,045
Re-exports	1,912,778	770,372	269 376
Total	57,705 392	30,966,147	32,683,550

POPULARITY OF POINTED-TOE SHOES IN BRITISH EXPORT MARKETS

One of the notable features in the British export trade in boots and shoes at the present time is the popularity of the pointed toe and low heel, says the *Shoe Manufacturers' Monthly*, Leicester. The demand comes from countries as far apart and different in taste as New Zealand and northern European countries. In New Zealand, this style of shoe sells in various leathers, including suede, patent, nigger glacé, and nigger calf. In the Netherlands and Norway, the demand is for nigger glacé, box calf, and black glacé. Half-round toes are selling well in these markets and everywhere heels are tending to be lower than formerly.

STATE OF THE COTTON TRADE IN MANCHESTER AND DISTRICT

Trade Commissioner J. E. Ray

Manchester, March 1, 1923.—The cotton trade, which is the staple industry of Lancashire, has experienced no revival of trade during February. True, a spurt asserted itself in the opening days of the month, but it was of brief duration, due in no small measure to the unsettled state of parts of Europe, but in a larger degree to diminished shipments of cotton piece goods to the great Indian market. It is well known that the increased production of the Indian cotton mills during recent months has had a serious effect upon Lancashire's cotton industry. It is reported that the loss of the Indian trade in 1922 was equal to nearly two full days' work a week for the entire industry for twelve months. It will thus be seen how dependent Lancashire is upon a speedy recovery of the Indian market.

The annual address of the President of the Manchester Chamber of Commerce analyzes the present situation, and sums up the prospects of the future in the following words: " I do not suggest that all our ills are going to be cured during the coming year—the cause of those ills is too deep seated, but I do believe that we have now a much better opportunity of helping to make our own circumstances than we have had in recent years, and I have enough faith in my fellow countrymen to believe that, if that is so, they will not be slow to avail themselves of it".

THE ITALIAN MARKET FOR CANNED FOODS

Trade Commissioner W. McL. Clarke

Milan, February 16, 1923.—It is a mistake to think that the Italians eat macaroni and spaghetti to the exclusion of most other foods. True, the *pasta* consumption is very large, more especially in southern Italy, but to single out these starchy foods and exclude other equally important diets is to miss the mark in summing up the characteristic national menu. Apart from bread, which undoubtedly is the staff of life everywhere in Italy, among the poorer classes *polenta* or maize porridge, *minestrone,* the thick vegetable and rice soup, the parboiled beans so popular in the central provinces, and *risotto* or the rice food, are with macaroni the staple dishes of the Italian table. As one goes, however, among the better-to-do classes and the purely Italian restaurants, he finds that the choice of food is less restricted. A typical Italian lunch, which the ordinary business man eats every day, consists of four plates as the Italian language puts it: (1) a dish of *risotto,* or macaroni, or semolina or else hors d'œuvres consisting of raw and cooked ham, sausage, sardines, and tunny fish; (2) a plate of meat or fish with two or three vegetables; (3) an ample portion of cheese; and (4) a basket of seasonable fruit. This with half a litre of red wine and a cup of black coffee constitutes the midday meal. Dinner is much the same except a dish of heavy vegetable soup, of which fat pork forms the nub, or meat extract the basis, often substitutes the first plate eaten at lunch. The inference is therefore, for the purposes of this report, that Italians of the spending classes eat not only a typical Italian dish such as spaghetti or rice but that they also eat meat, fish, vegetables and fruit. Even though the mainstay of the less well-to-do classes are vegetables and the *pasta* foods, and even though the preparation of such foods as macaroni may be a daily occurrence in the Italian kitchen, yet it is evident that the bulk of the Italians do not live on starch alone.

If then Italian palates are accustomed to meat, fish, vegetables and fruit, is there any appreciable liking for or a prejudice against these products when put up in containers? With the exception of meat extract, tomatoes, sardines, tunny fish and salmon, the writer has not seen any striking evidence that Italians relish canned foods. Tinned peas and string beans are often served by Italian chefs both in the home and restaurants during the winter months, but in the main their consumption is not large. Tinned fruits, which sometimes replace the cooked fresh fruit of the summer, may also provide an occasional dessert from November on, but the general predilection is always for fresh or dried fruits. Nor does an Italian relish liquefied condensed milk in his morning café au lait, even though in hotels it may be occasionally served. In short, dietary habits prescribe fresh food, and if during the war tinned meats and milk were a welcome source of larder supply, it cannot on that account be argued that Italians cultivated a permanent taste for preserved food. In the absence of what they liked, hunger dictated an abnormal table regimen. It is doubtful, moreover, whether tinned foods of any kind, owing to their price, have ever been fairly tried out by the great mass of the people. The market for Canadian tinned foods in Italy is by the nature of the demand and by the character of the supply pronouncedly circumscribed.

THE SUPPLY PHASE

Take the supply phase first. Tomato sauce is a stand-by in Italy, as it is used so extensively on macaroni and other dishes, but this tomato sauce—barring of course the summer use of fresh tomatoes—is prepared either from tinned tomato paste or canned plum tomatoes put up at home. In order to introduce Canadian tinned tomatoes into Italy it would be necessary to beat the Italians in their own field. Italian plum tomatoes and tomato paste enjoy an enviable reputation abroad, and certain Italian trade marks are perhaps as well known in foreign countries as is Canadian wheat outside of Canada. Normally Italy exports upwards of 2,500 metric tons a year of preserved tomatoes, or what would correspond in our measures to, say, nearly 3,000,000 two-pound tins. The available Italian supply then rules out the practicability of selling tinned tomatoes to Italy.

A second relish of the Italian table, as already intimated, is the sardine. As now bought in Italy, it is either fished from Italian waters or imported principally from Portugal and Spain. Scandinavian sardines are not asked for by the Italian purchaser, and few French sardines are taken. The imported fish now sells at double the price of the Italian sardine, but the foreign demand keeps on growing apace, and present yearly imports of some 5,500 tons are almost double the pre-war buying. Olive-oil packed sardines leave no preference, according to importers, over other varieties in Italy. Here again the character of the present supply would make Canadian competition difficult.

CANNED SALMON

Tunny fish, another common Italian food, is not a Canadian product, and Italy in any case draws its supplementary supplies from Spain, Tunisia, and other nearby Mediterranean countries. A substitute for tunny fish is tinned salmon, and it is because Italians are accustomed to tunny fish that they have more readily taken to imported salmon. Both are eaten generally as a hors d'œuvre with oil, vinegar and seasoning. When a pound tin of salmon costs approximately the same as a half kilo of tunny fish, the Italian will often buy the former. As these prices more or less correspond, there has grown up a pretty regular and not unimportant sale for tinned salmon. The war occasioned

a larger consumption than was warranted by ordinary demand and sales ran into hundreds of thousands of cases. Unfortunately a part of these imports consisted of inferior and even, in some cases, of inedible contents, which fact tended to drive this trade increasingly in favour of tunny fish. On the other hand, those Italians who during the war were fortunate in buying good salmon or who knew good salmon even prior to 1914, have not given up their purchases. Pink and chum salmon both sell, with the tendency to "pink" consumption. The determining factor governing purchases is the price, and Italians are not likely to buy salmon, red, pink or chum, if it is much beyond the price of tunny fish, while at the same time it is certain they will not put their household money into tinned salmon unless the salmon looks and tastes appetizingly after being emptied from the tin. To-day the 1-pound tall tin of pink salmon retails at 5 lire or 25 Canadian cents, and the 1-pound tall tin of chum salmon at 3.50 lire or about 18 cents. Red salmon is, at present exchange, much too high for this market.

One large food importer stated to the writer that some 50,000 cases a year would probably be a fair maximum estimate of this market's present yearly requirements. In other words, such a distribution, among 40,000,000 of people, means that one in every twenty persons would eat one can of salmon per year. The possibility of developing this trade is evident, and provided good fish is sent forward at a price competitive with tunny fish, the probabilities are that the Canadian trade, which is slowly growing, will be materially increased. At present there is more American tinned salmon for sale in Italy than there is Canadian, and even though the demand should remain stationary, the margin between American and Canadian sales might profitably be narrowed in our favour.

Another red labelled Canadian tinned fish which, like red salmon, is with exchange too expensive for this market, is canned lobster. One ½-pound tin now retails as high as 24 lire or $2.40 a pound, while fresh lobster may be purchased at the same stores for about 85 cents a pound. Obviously then tinned lobster holds out little attraction for the Italian buyer.

In previous reports on the Italian fish trade, reference has been made to the fact that too much Canadian tinned salmon and lobster comes into Italy via English houses. The Crosse & Blackwell trade mark in prepared food lines represents to the discriminating Italian what the word "sterling" does on silver, and the writer has observed that a large part of all the red salmon and lobster which comes into Italy is packed under this brand, although the word "Canada" is generally stamped on the top of the tin. It is all very well to sell our tinned foods to England, but when such products are reshipped to another country price is naturally higher than if such products were exported direct to the country of ultimate destination. It would seem that a contributing factor towards the prohibitive price of such canned goods as red salmon and lobster is the cost incidental to this dual selling. An improved method of distribution, entailing a lower shop price, would doubtless result in a greater Italian consumption and hence a larger market for our tinned fish.

MEAT EXTRACT

One other prepared food deserves a word of explanation before passing on to discuss the food products whose market depends on the nature of the local demand rather than on the character of the supply, and that product is meat extract. There is a very large consumption of meat extract in Italy, inasmuch as it is used extensively in the preparation of restaurant and domestic soups. When an Italian cook wishes to make soup, he uses as stock either a lump of fat pork, a soup bone, or else meat extract. The last-named commends itself

because it is always ready, and hence there are few Italian kitchens which do not at some time or other during the week use meat extract. But here again the character of the present supply would make it somewhat difficult to introduce new brands. The Liebig company are the best known exporters of meat extracts to Italy and do by far the largest amount of the trade. The war introduced other extracts, but Liebig continues to hold the bulk of the business; in fact it has been recently reported that this company is to put up its own factory in Italy in order to cater direct to this trade rather than ship from Antwerp, as is now being done.

CANNED MEATS

The demand for canned meats in Italy is small. American lunch tongues are exhibited on the grocery counters, but their present price of 60 cents per pound tin makes purchases but a rare occurrence. It is the opinion of food merchants in Italy that the only tinned meat that will sell at all is lunch tongue, when it is laid down at a price somewhat below that of fresh tongue, or say 50 cents a pound. A very limited amount will be absorbed at this price, as the Italians prefer to pay a little more and eat the fresh cured tongue.

CANNED VEGETABLES

Apart from tomatoes, the tinned peas and string bean trade comes first under the heading of canned vegetables. The writer has found it practically impossible to get a definite statement as to the annual output of these products in Italy, and this despite the fact that the industry contributes between 2,500 and 3,000 tons a year to Italian exports. It may be safely said, however, that about half of the pack is exported every year, so that some 3,000,000 kilos (equal to about 6,600,000 one-pound tins) are consumed at home. A maximum of 8,000,000 one-pound tins, or one tin for about every five persons, would then fairly well represent the annual Italian purchase of tinned peas and beans. The smallness of this consumption is rather astonishing in view of the fact that these Italian products are exceptionally good, and points to the previously expressed inference that the Italians invariably prefer fresh vegetables. The future of the canning industry in Italy depends largely, it would seem, on the development of export markets. Until recently it was the custom of Italians who went in for raising early peas to ship these across the frontier to France, where they were packed as French peas and where they could, on account of their excellent quality, be mixed in the same tin with the tender green French peas. Italian canners are now endeavouring to build up their own export organization, not only in the canned pea industry but in the green string bean industry as well. These string beans are grown mostly on the volcanic soil around the base of Mount Vesuvius, and great care is being taken to select young, tender and delicate stock for canning, with the result that Italian canners are building up a foreign reputation for the natively grown and processed pea and bean. The trend of trade in these canned vegetables is in the direction of exporting, and this market cannot hold much inducement to Canadian canners of peas and early string beans.

It is somewhat curious that canned pork and beans, consisting as it does of two ingredients which Italians eat so much, has not taken hold in Italy. The American and Canadian product has been found on an isolated grocery shelf, but the few tins were left over from army supplies. This food product has never been popularized among the Italians, and yet it would probably form a satisfying side-dish for a large part of the population. Importers state that there is no demand at present, nor has one ever existed. Its introduction would mean virtually pioneer work, but pioneer work which should have a fairly good prospect of success.

The same statement cannot be made about canned corn. Italians never eat fresh corn on the cob, but the young ears are allowed to ripen and then ground into yellow flour, from which the famous Italian *pilenta* dish is made. What is not liked in the raw or fresh state is hardly likely to become popular when preserved. If an American can purchase a can of sweet corn or asparagus in a city grocery shop it is not because that asparagus or corn is there for the Italian clientèle, but because that shop is catering to what it considers the *de luxe* and odd taste of the foreign resident.

CANNED FRUITS

Italy is often spoken of as "the country of fruit," and it is not surprising to find that enterprising Italians have undertaken successfully the canning and preserving of local products. An extra fillip has been given this industry by the import demand of foreign countries, and Italians have not only been able to care for the principal tinned and preserved fruit requirements of the national market but have launched out into foreign fields.

While they are selling about 1,000 tons a year (nearly 1,000,000 2-pound tins), it is doubtful if the home demand is appreciably larger than that which the local fruit packers at present supply abroad. Nor is this surprising when one considers that tinned fruits are as a general rule too expensive to compete with the fresh fruit which is available practically all the year. In the winter months Italy's tangarines, oranges and apples generally satisfy the indispensable fresh fruit course of the Italian menu, though often supplemented by dried figs, nuts and dates. All of these fruits come less expensive than a compensating amount of tinned fruits, while at the same time it is to be considered that there is no pronounced hankering for the more expensive product. Nationally-produced tinned fruits are as a matter of fact expensive in Italy because of the manufacturers' surtax on sugar, and as this has gone up in the last few years the cost of the finished product has proportionately increased. Imported tinned fruits are still more expensive because of the tariff, which is based on the sugar contents of the container, and is in addition to the manufacturers' surtax. There is little wonder that this market has but small encouragement for the foreign exporter.

An additional consideration which hampers the sale of tinned fruits in Italy is the fact that thick jams and marmalades are preferred to the fruits in syrups. Pies in Italy are nearly always made from these thick jams, and may or may not be eaten with the early morning meal. The result is that for one tin of syruped fruit sold there are probably fifty tins or jars of marmalade. In this industry Italian manufacturers command the trade. Swiss and English jams are occasionally sold, but the foreign sales are perceptibly exiguous. Syruped fruits give way before jams, jams before dried fruits, and dried fruits before all kinds of fresh fruits. Hence we come back again to the original statement that fresh foods and not preserved products are primarily in demand.

CONDENSED MILK

With the large chocolate-making interests in Italy, and the continuous use of ice-cream and cake for afternoon or evening refreshment, one would almost expect to find a pretty big consumption of condensed milk. If these industries utilize a certain amount of condensed milk, it is practically not used at all by the population as a substitute for fresh milk.

An important condensed milk industry has been developed in Italy, and approximately 250 tons were exported last year. What small amount of foreign condensed milk is now sold in the different cities is practically all of Dutch and Swiss processing, but, as already intimated, this demand cannot be considered strikingly important.

CONCLUSION

With the exception of tinned salmon, the actual demand in Italy for such tinned foods as Canada produces must be looked upon as extremely meagre. The present exchange adds very appreciably to the cost of canned goods when imported into Italy from Canada and is, to some extent, responsible for the non-shelving of what may be called Canadian tinned food specialties. Foreigners residing in Italy may often inquire for foreign products, but the relatively small number of these in a population approximating 40,000,000 renders Italy's demand but very slight. Another permanent outlet for tinned food specialties is to be found in the hotels which cater to the foreign tourist trade, but this intake is necessarily restricted. Another permanent opening is found among those firms, principally at Genoa and Naples, which handle ship supplies, but this trade can hardly be called "Italian," as the goods do not enter the customs but are kept in bonded warehouses at the principal ports. Canada's opportunity at present is in tinned salmon, but even this commodity must be considered as a substitute for tunny fish.

The bars are pretty well up against tinned food products, not so much because there is an inherent prejudice against eating such foodstuffs, but rather because there is a distinct preference for fresh food, which is generally available in plenty.

THE CEMENT MARKET IN BRAZIL

Trade Commissioner E. L. McColl

Rio de Janeiro, February 20, 1923.—Cement imports into Brazil for ten months ending October, 1922, totalled 261,793 tons of 1,000 kilos, the principal countries of origin being as follows:—

	Tons.		Tons.
Germany	93,120	United States	19,728
Denmark	50,764	Sweden	16,117
United Kingdom	29,113	Italy	10.964
Belgium	27,925	Canada	2,554
	Tons.		Tons.
Average per month, 1922	26,179	Average per month, 1919	16,535
Average per month, 1921	13,073	Average per month, 1909-1913	26.116
Amerage per month, 1920	14,416		

The cost per ton from the principal countries of origin for the ten months ended October, 1922, was as under:—

	F.O.B.	Insurance and freight	C.I.F.
Germany	82$651	29$468	112$110
Belgium	102$617	31$426	134$043
United States	88$095	36$962	125$057
United Kingdom	99$102	44$119	143$221

The percentages of total imports of cement received from the different countries is as follows:—

	Average per Year 1908 to 1913	1920	1921	10 months. 1922
Germany	43.7	7.9	52.7	35.9
United Kingdom	28.7	27.6	15.5	11.0
United States	4.6	44.4	5.1	7.2
Other countries	23.0	20.1	27.7	45.9
	100.0	100.0		100.0

The principal points to be noted are the increase of importation to about double that of the recent yearly average. Germany again heads the list with a great lead. The reason for this is the low c.i.f. cost of her cement of 112$119 per ton or about $13.19. The small shipments of Canadian cement which come in (1 per cent of the total imports) are very well liked on account of the high regular quality, but owing to lack of transportation facilities it is difficult to obtain anything like a competitive price.

TRADING POSSIBILITIES IN HOLLAND FOR CANADIAN PRODUCTS

Trade Commissioner Norman D. Johnston

(6) The Demand for Sugar

DUTCH PRODUCTION AND RAW SUGAR REQUIREMENTS

Rotterdam, February 21, 1923.—Holland is quite a large manufacturer of sugar, but a good import business is also done. The domestic sugar beet crop is estimated by F. O. Licht at about 270,000 tons for the last harvest. About 3,152 metric tons of 1,000 kg. of raw beet sugar were imported in 1922, all of which came from Belgium, and 2,670 tons in 1921, as well as 106,774 tons of raw cane sugar last year and 19,540 tons in 1921. In 1921 the United States was the largest supplier of raw cane sugar to Holland, with the Netherlands East Indies second, while last year Cuba was the largest source of supply for raw cane sugar, with the United States second. The British possessions in America and Suriname also furnished smaller quantities.

The new crop production in Holland starts about September 1, the Dutch sugar works reckoning their book-year from September 1 to August 31. The total production of sugar reduced into white sugar in beet-sugar works and refineries, obtained from Dutch processed beetroots during the book-year September 1, 1921, to August 31, 1922, was about 346,461 metric tons of 1,000 kg. During the calendar year 1922 the production was a little over 252,063 metric tons and the total production of sugar for consumption processed as well in beet-sugar works as in beet-sugar works refineries and other refineries was for the book-year and calendar year respectively about 391,448 and just over 404,630 metric tons of white sugar, inclusive of all kinds of refined sugar, and 6,434 and 6,388 metric tons of soft sugar such as brown or bastard sugar.

REFINED WHITE SUGAR

According to the Netherlands preliminary statistics, Holland imported 22,828 metric tons of refined white sugar (so-called Melis) with a value of 5,307,000 fl. in 1922 as compared with 20,529 tons valued at 7,408,000 fl. in 1921. The values of the comparative quantities will give an idea of the great fall which has taken place in the price of sugar during the past year. The largest sources of supply in 1921 were the United States (11,851 metric tons), Belgium (5,037 tons), and the Netherlands East Indies (1,968 tons). The following table will show the principal countries of supply for white sugar in 1922:—

Country of Origin	Quantity Kgs.	Value Guilders
Total	22,827,588	5,307,445
Germany	92,379	24,039
Belgium	8,621,451	1,844,699
Great Britain	487,826	126.861
United States	9,810,208	2,383,411
Netherlands East Indies	3,306,855	808,145
Czecho-Slovakia	14,989	3,450
Canada	437.652	100,973
Chili	13,676	3,450
Fed. Central America	36,043	10,736
Cuba	5,201	1,257

Holland is also a large exporter of sugar, having exported in 1922 about 197,615 (metric) tons and in 1921 about 159,829 tons of refined white sugar

(so-called Melis), including crystal and other sugar not specifically mentioned. The statistics show thirty-five countries to which she exports, the largest buyers being Germany, Great Britain, European Turkey, Ireland, and France.

Whether firms in Holland buy Dutch sugar or foreign sugar depends very much on prices. At some periods Dutch sugar is purchased, while at other times imported sugars are bought heavily on account of lower prices. Canadian firms should therefore quote as low as possible, and at the same time furnish a quality equal to requirements. As indicated in the table, Canada got well into the business in 1922, and there would appear to be no reason why considerably more trade should not be done in the future.

The following are the classes of sugar most in demand:—

GRANULATED SUGAR

Canada did some business in granulated sugar last summer, but in this product it will probably only be possible to cater at certain seasons, as Holland is a large manufacturer. When Dutch firms are in the market prices are frequently arranged, if possible, to keep out competitive lines. Imports of sugar, however, arrive from Java, Belgium, Great Britain, Czecho-Slovakia, and the United States.

It is thought likely that in the near future there will be a good opportunity to do business in Canadian granulated sugar in Holland and probably in the Rhine districts of Germany, although it is difficult to say what the position will be regarding the latter on account of the French occupation. Last year United States sugar imported from Holland in the spring sold in the Rhine district of Germany, and it is supposed that in the course of two months or so the inland production will be exhausted. American granulated sugar is sold mostly to grocers, and the bakers prefer the Dutch beet sugar on account of the fact that it gives a whiter product when boiled.

Granulated sugar is usually sold in bags of 100 pounds net, 50 kgs. net, and sometimes 1 cwt. (112 pounds) net. Double bags are generally used, the most approved method being an inner bag of cotton with an outer bag of jute for protection and cleanliness.

The usual polarization of granulated sugar used in Holland is 88, on which the duty is 27 fl. per 100 kgs. For household consumption granulated sugar is more extensively used than any other kind.

TABLET AND CUBE SUGAR

Loaf sugar is restricted in its use to hotels, restaurants and cafés; the principal demand otherwise being for tablet form, similar to the German product called "Wurfel." Cubes are used to a certain extent, and they are imported for export to Belgium and Scandinavia, where this form is preferred. Scandinavia also imports tablets from Holland.

It is unnecessary to have the lumps separately wrapped in paper unless there is very little difference in price between the wrapped and unwrapped loaf sugar. The wrapped must not, however, be more than two guilders per 100 kgs. higher in price. The most popular form of wrapped or packet sugar in the restaurants seems to be two oblong-shaped tablets in each wrapper. Sometimes three smaller tablets are placed in a wrapper.

The greatest part of the Dutch imported tablets or cubes is sold unwrapped in wooden boxes of 25 kgs., the boxes often being lined with blue paper. Cubes are also packed in boxes of 50 kg. The tablets in greatest demand are those of about 240 to the kg.

PULVERIZED SUGAR

Pulverized sugar is used extensively by bakers and confectioners in making icings or sprinkling over the tops of cakes or confectionery of various kinds. Very little cake or confectionery cooking is done in the Dutch homes, as most of the requirements are purchased at the pastry shops. Most of the pulverized sugar used is of Dutch origin, but if Canadians can compete in price a good trade is possible.

BASTARD OR BROWN SUGAR

The greatest opportunity in Holland at present would appear to be for so-called bastard, brown or moist sugar, and the writer has had a great many inquiries for this kind of Canadian sugar.

In 1921 the Netherlands imported about 4,085 (metric) tons, with a value of nearly 1½ million guilders, while in 1922 the imports of bastard or brown sugar amounted to about 5,117 tons valued at 1,080,000 fl. Great Britain and the United States have been the principal sources of supply. Canada is doing a small trade in this line, having shipped over 20 tons in 1921 valued at 4,250 fl., and the product is very well liked. The use of brown sugar is growing.

The polarization should be about 88 or lower; the lower the better, as it is then imported at a lessened duty. Jute bags of 100 pounds or 50 kgs. net are generally used, although some imports arrive in bags of 100 kgs., but these are rather large.

Prices depend upon the colour and percentage of sweetness. Several firms offer about four colours ranging from light yellow to brown. The medium colour is the greatest in demand, but there is also a sale for the other colours. It should not, however, be too dark, the more or less yellow or fawn shade being mostly wanted.

GLUCOSE

There is a fair amount of business done in imported glucose or grape-sugar of Fecula. It is imported in various forms, the greatest quantity being liquid glucose and massé in pieces or blocks. Most of this comes from the United States, namely, 4,044,848 kg. with a value of 602,097 fl. out of a total import in 1922 of 4,419,224 kg. valued at 665,916 fl., and 2,484,231 kg. with a value of 448,701 fl. in 1921 out of a total of 2,945,603 kg. valued at 556,978 fl. and Great Britain supplied practically all the remainder.

Glucose or grape sugar in a solid, granular and powdered form, as well as rasped or otherwise pulverized massé, was imported to the amount of 25,199 kg. valued at 7,162 fl. in 1921, of which Belgium furnished 25,040 kg. with a value of 6,360 fl. Belgium also supplied most of it in 1922, 11,000 kg. valued at 2,320 fl. out of a total of 12,996 kg. valued at 4,960 fl. Germany exported to Holland only 1,498 kg., but it had a greater value than the larger imports from Belgium, namely 2,545 fl.

Burnt grape-sugar or caramel is also imported, Belgium having been the largest source of supply in 1921 and Germany in 1922. Out of a total importation in 1921 of 19,750 kg. with a value of 5,774 fl., Belgium furnished 17,518 kg. valued at 4,463 fl. Last year Germany supplied 25,544 kgs. with a value of 11,451 fl. out of a total import of 33,723 kgs. valued at 14,043 fl.

Holland exported liquid glucose and massé in blocks to the amount of about 529,000 kg. in 1921 and 333,000 kg. in 1922, as well as about 15,000 kg. and 70,000 kg. in 1921 and 1922 respectively of solid, granular and powdered, besides rasped or otherwise pulverized massé, and about 36,000 kg. of caramel in 1921 and 23,000 kg. last year.

It can therefore be said that, taking the trade in glucose as a whole, the imports have increased while the exports have decreased, so that if any Canadian firms are interested in exporting this product to Holland there should be a good opportunity to supply part of the growing demand providing prices are competitive.

SUGAR PRICES

Following on the announcement of Mr. Hoover that a shortage in the world's sugar supply this year of 250,000 tons was expected, and the lowering at the same time of Guma's estimate of the Cuban harvest by 400,000 tons to 3,800,000 tons, prices in Holland, sympathetically with those in the United States and England, jumped on February 14 for nearly all deliveries to about 35 fl. ($14.07), and here and there even 36 fl. ($14.47) and 37 fl. ($14.87) was paid per 100 kg. The following day, however, the state of affairs became more normal and the market closed at 32.12½-32.37½ fl. ($12.91-$13.01) for March, 31-31.12½ fl. ($12.46-$12.51) for July, and 29.50 fl. ($11.86) for August delivery, at a weekly output of about 6,300 tons. Since then prices have shown an upward tendency, and on the day of writing (February 21) the prices paid on the Amsterdam exchange are 34⅛, 34¼, 34¾, 34⅝, 34½, 33¾ and 33 fl. for February, March, April, May, June, July and August delivery respectively of white crystal sugar per 100 kg. net in bond. At the same time raw superior Java sugar is quoted at 19 fl. ($7.64) for February-April, 16.75 fl. ($6.73) for July and 16.50 fl. ($6.63) for August delivery. Increased prices will aid Canadian refineries, providing raw sugar prices do not go too high, in obtaining a larger share of the sugar business in Holland.

DUTIES

The duty on sugar imported into Holland varies according to the polarization. The excise tax on Dutch manufactured sugar is an equal amount, but when the Dutch sugar is exported it is unnecessary to pay this excise tax. The following are the duties and excises according to polarization:—

Polarization.	Duty or Excise in Fl. per 100 Kilos.
99	Fl. 27.00
98	Fl. 26.46
90	Fl. 24.30
85	Fl. 22.95
80	Fl. 21.60
75	Fl. 20.25
70	Fl. 18.90
67	Fl. 18.09
Less	Fl. 18.00

PACKING

Granulated or similar sugars are preferred in double bags of either 100 pounds or 50 kg. (110 pounds) net, although sometimes bags of 100 kg. (220 pounds) or of 1 cwt. (112 pounds) are used. The double bags are either two jute bags, one over the other, or a cotton bag covered by a jute bag. It depends upon the additional cost as to which method is adopted, or perhaps it will be possible to obtain a jute bag strong enough by itself to stand the wear and tear of shipment. The great importance is security, but it would seem advisable to use double bags of cotton and jute for the higher class sugars and double jute bags for the lower grades.

Cubes and tablets are generally packed in wooden boxes of 25 kg., although cubes are sometimes sold in boxes of 50 kg. The boxes should be lined with blue paper or some other paper which gives an equally good effect. Tablets should be arranged about 240 to the kg.

The bags and boxes should be well and legibly marked showing the quantity, and any other necessary details so that all possible satisfaction may be given to the importer.

CONSIGNMENTS

Most of the Dutch firms are very desirous of having foreign firms send sugar on consignment, and this method has advantages as it enables a stock to be kept on the spot, which is a great aid in introducing a new brand, and is helpful in getting German business where the fluctuations in exchange make forward business difficult. Dutch sugar can be obtained at short notice, which is a great inducement to buyers who, under existing conditions, do not like contracting far ahead and prefer to buy smaller quantities as they can do in the case of Dutch sugar or of stocks of foreign sugar held in the country. Certain English and Belgian firms are sending sugar on consignment to Holland.

While this system has the advantages enumerated above, great care should be taken before entering upon a consignment business, and every possible inquiry should be made regarding the firm to whom the consignment is to be made as it is a business which is very difficult to check or control, and the Canadian exporter should first of all make sure of the reliability of the Dutch firm and the possibility of doing business at remunerative prices.

When these matters have been ascertained, and if it is decided to send a shipment on consignment, the stock kept in the country should be as small as possible, only large enough to fulfil the purpose for which it is required, namely to introduce the brand, to supply orders in Germany or other countries with fluctuating exchanges which buy from Holland and where the purchasers will not contract ahead, or to enable smaller lots to be supplied to smaller buyers or where the importer does not wish to purchase large lots under uncertain business conditions.

It is better to send small parcels periodically, on consignment, rather than a large shipment, as the former creates a more rapid turnover and the money is not tied up for so long. The maximum amount to be sent on consignment should be about 100 tons, and as the business develops the amount of stock which it is required to keep in the country should gradually become less and less as the brand will become better known and it will be possible to estimate approximately the probable requirements which can be sent at regular periods so as to arrive in time to renew depleted stocks. In any case a consignment business should be made supplementary to direct shipments, and wherever possible the orders should be sent to Canada for shipment direct to the customers, the stock on the spot being used only for the purposes previously mentioned or to fulfil a buyer's immediate requirements. In this way it is not harmful to firm orders, and with a view to ensuring that the hardship entailed by the money being tied up for a somewhat longer period than for direct business may be borne by both parties, certain of the commission agents in Holland will advance 60 or 70 per cent of the c.i.f. value of the shipment on arrival of the documents in Holland. If a consignment business is found desirable such an arrangement should, if possible, be made with the Dutch representative.

BUSINESS ON FORWARD DELIVERY

A great part of the business in imported sugar is done on a basis of forward delivery, and this should be the principal method adopted in developing a trade in Canadian sugar. As has been stated, a consignment business should just be used as an aid to the main direct delivery business. In this case the refined sugar is sold according to colour and quality, and the method preferred is on the contract of the Amsterdamsche Liquidatie Kas, when delivery takes place

on a warrant, or in Amsterdam in front of the Gemeentelyk Handelsentrepôt (commercial warehouse of the city), or in Rotterdam in front of the warehouse situated at a fair navigable water, net weight.

SAMPLES SUBMITTED

If business is desired only on a direct basis without the help of consignments, type samples should be sent in sufficient quantities to enable the quality and colour to be widely demonstrated and exhibited to the various importers and all orders filled should be absolutely equal to the samples submitted.

QUANTITIES SOLD

The quantities usually shipped direct are orders of at least 50 tons at a time. Sometimes, however, it may be advisable to ship 25 tons in order to introduce the brand, while if the sugar is afloat or warehoused in Holland, it is possible to sell 10 tons at a time.

ARBITRATION

Various methods of arbitration are specified in selling sugar in Holland. Dutch firms very much prefer Amsterdam arbitration, as it is stated that it saves much time and trouble as both the buyer and agent are on the spot, but some United States firms will not agree to Amsterdam arbitration and specify London arbitration. Amsterdam arbitration will probably be found quite safe and satisfactory, but if Canadian firms desire absolutely to safeguard themselves, London arbitration will likely be more secure.

THE APPOINTMENT OF A REPRESENTATIVE

The prices of sugar are so variable and the competition is so keen that the most satisfactory, and in fact the only possible way to get good results, is to appoint sole representatives in Holland. The Canadian refinery can then keep in constant touch with this firm, who in turn can remain in daily contact with the wholesalers, keeping the Canadian concern informed of market conditions. Care, however, should be taken in the selection of an agency firm so that a reliable representative, with a good reputation and well connected in the trade, may be appointed. In this regard the Canadian Trade Commissioner can be of considerable assistance and will be pleased to help any Canadian exporter to get into touch with likely Dutch firms.

If it is decided to send the sugar on consignment, it would be wise to have it specified that the agent's books are to be examined by a chartered accountant once or twice a year, and that a statement of sales is to be sent to the Canadian firm weekly, or at least fortnightly, and the money paid into the bank on the due dates.

The usual agents' commission is 1 per cent.

TERMS AND QUOTATIONS

Quotations should be submitted c.i.f. Amsterdam or Rotterdam in United States dollars per 100 pounds net weight, packed in double bags or, if lump sugar, in boxes. If United States and Canadian dollars are on a par, it will not make any difference whether the quotations are in American or Canadian currency—in fact it would be better to quote in the latter in order to get the Canadian dollar better known, but if there is any difference in value it will be best to quote in United States dollars as it is more difficult to ascertain the value of the Canadian dollar in Holland.

The usual terms in selling sugar in Holland are cash without discount against shipping documents on first presentation in Holland. Business should not be attempted on poorer terms than these, such as the establishment of an irrevocable letter of credit in Canada and payment against shipping documents upon presentation to a bank in the Dominion; this will only be a waste of time and money. Other countries give terms of cash against documents in Holland, and if Canadian firms are to meet competition they must do likewise. Dutch firms can get these terms from competing countries whose brands are known, and they will not buy a new brand from an unknown source on terms which will necessitate the tieing up of their money for a much longer period. Close attention should be paid by Canadians in order to meet the necessary requirements of the trade.

The Canadian Trade Commissioner will be glad to hear from Canadian exporters desirous of developing a business in Holland. If at the time of writing they forward small samples, quote prices, terms, etc., and clearly indicate the sales policy it is desired to pursue, all possible assistance will be given to get them in touch with the most likely firms.

ECONOMIC CONDITIONS IN HOLLAND

Trade Commissioner Norman D. Johnston

Rotterdam, February 24, 1923.—The 6 per cent Netherlands Government loan which was offered to the public in January at 97 was so largely oversubscribed that only one-fifth of the amount applied for could be allotted. The total Government receipts during 1922 amounted to 468,769,421 fl., exceeding those for the previous year by over 30½ million guilders, and the revenue estimates by about 100,000 guilders. The revenues from the supertax for the "1914 Loan Find" (destined to apply on the loans raised since 1914) totalled 132,136,433 fl. for 1922, as against 117,428,849 fl. for the previous year.

While the values of imports and exports of Holland show a decrease of 213,640,343 and 148,367,389 fl. respectively, as compared with 1921, the quantities imported and exported were much greater last year than in the previous year, the increase in the former being 2,250,312½ metric tons and in the latter 1,193,634½ metric tons. In 1922 Dutch imports were 19,468,152 metric tons valued at 2,026,578,760 fl. and her exports to 6,908,206 metric tons with a value of 1,221,231,211 fl.

As an indication of the comparatively small effect which the competition of countries with a depreciated currency (as against the high value of the Dutch guilder) has had on the commerce of Holland, it may be pointed out that last year in the trade in manufactured articles there was a moderate shrinkage in imports of 2 per cent (from 3,593,000 metric tons to 3,508,000 metric tons), while exports increased from 915,000 tons to 1,276,000 metric tons or by 39½ per cent.

The wholesale index numbers show that prices have become more stabilized, and for November and December remained stationary at 180 for fifty-three articles and at 172 for food supplies as compared with 183 and 179 respectively at the beginning of 1922.

The new stock issues in 1922 amounted to 435,574,008 fl., a decrease of over 37¼ million guilders as compared with the previous year. The stock exchange index number for the twenty-five principal stocks, after increasing from an average of 153·44 at the beginning of the year to 162·07 about the middle of April, decreased to 126·64 during July, and then gradually rose to 146·08 at the end of the year. The rise was maintained and showed a further

increase during the first fortnight of January, but fell off to 141·41 at the end of the month. The only stocks to show an increase were the bank shares.

The wholly unemployed at the close of the year amounted to 11·5 per cent as against 17·4 per cent at the beginning of 1922, while the partly unemployed was 2·7 per cent as compared with 4·8 per cent. The number of suspensions of payment was, however, heavy, being 3,403 in 1922 as compared with 2,264 in 1921, and 1,491 in 1920. This increase was probably due to the failure of some of the businesses established during the war.

In order to assist Dutch business at home and abroad, the Government seems disposed to do something to meet the wishes of the advocates of protective measures either against foreign competition or to facilitate Dutch exports, without actually ceasing to support free trade in principle. The Government is particularly anxious to further exports, and with this end in view will make use of an export credit guarantee scheme representing an advance of 30 to 50 per cent of the invoice values. Another scheme engaging the Government's attention is the proposal to give financial assistance to enterprises which have suffered most from German competition.

CONDITIONS IN FRANCE

Trade Commissioner Hercule Barré

Paris, February 26, 1923.—According to the Bureau of Statistics, the cost of living in France rose 25 per cent during the month of January as compared with the first quarter of 1922. Taking 100 francs as a basis for 1913, the cost of living averaged 418 francs for the year 1922, decreasing to 357 francs for the first quarter, and rising to 417 francs in January, 1923. Wages have recently remained stationary, but there is a widespread agitation for increases, especially since the cost of bread has advanced 2 sous. Food which could be purchased for 1 franc in 1914 cost 4 francs in 1921 and 4¼ francs at the present time, while textiles have increased in price sixfold since 1913. These increases are largely due to depreciation in exchange and the consequent increased cost of imports.

During the past month the attention of commercial circles has been concentrated on the events of the Ruhr and the introduction of a bill to provide for an increase in taxation. Public opinion supports the initiative taken by M. Poincaré in the occupation of the Ruhr, but the bill of the Minister of Finance, the effect of which would be to increase all present taxes by about 20 per cent, is being strongly opposed and is causing grave discontent among all classes.

The coal mines in the north and east of France have necessarily felt the effects of the operations in the Ruhr and the difficulties met with in exploiting the German mines. There has been a considerable increase in price and general unsettlement, and numerous manufacturers are compelled to fill their needs solely with British coal, the high cost of which cannot do otherwise than increase the price of manufactured products. Prices for woollens and worsteds are becoming steadier, and buyers can gain nothing by putting off the placing of their orders, while cottons show some activity. An important revival is noticeable in the metallurgical industry, in which orders from railway companies and the Department of Marine are causing some activity. Large cycle orders have been booked for the British colonies, exchange being favourable to such trasactions and the Germans for the time being unable to compete.

Spring sowing is over and the winter cereals are in perfect condition, due to the mild weather and to the rain which has fallen during the month.

NORTH AMERICAN SALTED SALMON IN JAPAN

Mr. A. E. Bryan, Canadian Trade Commissioner in Yokohama, writes under date February 7, 1923, that, according to an authoritative Japanese report, salted salmon imported from North America into Japan this winter amounted to approximately 33,000 boxes. The quality and taste are stated to have been better than ever before, and their large size makes them suitable for Japanese New Year gifts. These fish have sold very well in Hokuetsu District, while in the Johan District and North-Eastern Japan, the importation of Russian salmon has been affected—namely, a much smaller quantity of Russian salmon was imported than has previously been the case.

NEWFOUNDLAND WITHDRAWS 25 PER CENT SURTAX

With reference to the announcement in *Weekly Bulletin* No. 906 (June 13, 1921, page 939) regarding a 25 per cent surtax on imports into Newfoundland, Mr. A. E. MacEachern, Junior Trade Commissioner, who is now in Newfoundland, on being asked for confirmation of a report that Newfoundland had withdrawn the surtax, cables: "Newfoundland withdrew customs supertax of twenty-five per cent of duty and surtax effective February seventeenth. Present regulations include regular duty on which there is surtax of ten per cent plus sales tax of five per cent on cost of goods and amount of duty and freight."

The Act authorizing the 25 per cent surtax which has been withdrawn was passed in Newfoundland on August 12, 1921.

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain.	*Montclare*	St. John	March 23
" " "	†*New Amsterdam*	New York	" 24
" " "	†*Paris*	"	" 28
" " "	–*Marloch*	St. John	" 30
" " "	†*Majestic*	New York	" 31
" " "	*Regina*	Halifax	April 2
" " "	†*Minnekahda*	New York	" 5
" " "	*Montcalm*	St. John	" 6
" " "	–*Minnedosa*	"	" 7
" " "	†*President Harding*	New York	" 7
France	**Welland County*	St. John	March 24
Union of South Africa	**Jekri*	"	" 31
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela.	*Chaleur*	Halifax	" 30
Barbados, Trinidad, British Guiana	**Canadian Beaver*	"	" 24
Bermuda, Bahamas, Jamaica, Colombia, British Honduras	**Canadian Forester*	"	" 28
Bermuda, Barbados, Trinidad, British Guiana	**Montezuma*	St. John	April 7
China and Japan	*President Jefferson*	Victoria	March 27
" " "	*Empress of Australia*	Vancouver	April 5
Australia only	‡*Ventura*	San Francisco	March 27
Australia and New Zealand	*Niagara*	Vancouver	" 30

† Letter mail only. * Parcel post and specially addressed correspondence only.
‡ Letter and paper mail only. – Papers, parcel post and specially addressed correspondence only.

Note.—The *Minnedosa* will be used for direct mail for the Continent including direct Parcel Post to France.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING MARCH 13, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement on the nominal closing quotations for all the principal exchanges for the week ending March 13, 1923. Those for the week ending March 6 are also given for the sake of comparison.

		Parity	Week ending March 6, 1923	Week ending March 13, 1923
Britain .. ..£	1.00	$4.86	$4.7776	$4.7952
France .. ..Fr.	1.	.193	.0619	.0616
Italy .. ..Lire	1.	.193	.0487	.0487
Holland .. ..Florin	1.	.402	.4021	.4034
Belgium .. ..Fr.	1.	.193	.0542	.0540
Spain .. ..Pes.	1.	.193	.1583	.1574
Portugal .. ..Esc.	1.	1.08	.0445	.0438
Switzerland.. .. .. Fr.	1.	.193	.1898	.1902
Germany .. .. Mk.	1.	.238	.000045	.000048
Greece .. .. Dr.	1.	.193	.0127	.0127
Norway .. .. Kr.	1.	.268	.1851	.1850
Sweden .. ..Kr.	1.	.268	.2705	.2717
Denmark .. .. Kr.	1.	.268	.1947	.1952
Japan .. ..Yen	1.	.498	.4933	.4947
India .. .. R.	1.	2s.	.3255	.3238
United States .. ..$	1.	$1.00	1.0171	1.0203
Mexico .. ..$	1.	.498	.4996	.5004
Argentina .. ..Pes.	1.	.424	.3789	.3774
Brazil .. .. Mil.	1.	.324	.1182	.1147
Roumania .. .. Lei	1.	.198	....	....
Jamaica .. ..£	1.	4.86	4.7947	4.8118
British Guiana .. ..$	1.	1.		
Barbados .. ..$	1.	1.		
Trinidad .. ..$	1.	1.		
Dominica.. .. ..$	1.	1.		
Grenada .. ..$	1.	1.	.9936-.9987	.9964-1.0015
St. Kitts .. ..$	1.	1.		
St. Lucia.. .. ..$	1.	1.		
St. Vincent .. ..$	1.	1.		
Tobago .. ..$	1.	1.		
Shanghai, China .. ..Tael	1.	.708	.7717	.7866
Batavia, Java .. .. Guilder	1.	.402	.3967	.3978
Singapore, Straits Settlements .. $	1.	.567	.5645	.5661

TENDERS INVITED

South Africa

Copies of specifications have been received from the office of the Canadian Trade Commissioner, Cape Town, for the supply of steel wire rope required by the South African Railways and Harbours. These specifications are on file in the Department of Trade and Commerce, Ottawa, and may be obtained on application to the Director, Commercial Intelligence Service, quoting file number 26705 (tender No. 421).

AGRICULTURAL IMPLEMENTS FOR JAPAN

The Japanese Government encourages the use of modern farm equipment, and this has had an effect upon the employment of agricultural implements, creating a market in connexion with an industry which formerly was considered unimportant because of the small sizes of farms and the poverty of farmers. The day is passing when farms can be tilled without the aid of modern devices, owing to increased demands for rice and other products of the land. Labour troubles also play their part; the districts around Osaka suffer from labour agitation, and farmers are replacing manual labour by machinery. Several importing firms are suggesting educational courses for farmers and workmen; one firm has given a series of lectures, and similar courses are planned throughout Western Japan.

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1375. Flour.—A Danish concern would like to hear from Canadian exporters of flour desirous of being represented in Denmark.

1376. Flour and Cereals.—A commission agent in Trinidad desires to obtain a connection for flour and cereals. C.i.f. quotations; shipment through Canadian ports. Agent can sell several thousand bags of flour per month.

1377. Flour.—A firm in Genoa dealing in flour are anxious to get in touch with Canadian firms willing to open up business connections with Italy.

1378. Flour.—A Danish concern is desirous of getting into touch with Canadian exporters of flour interested in being represented in Denmark on an agency commission basis.

1379. Linseed Oil Cake.—A firm in Denmark would like to represent Canadian firms for the sale of linseed oil cake in Scandinavia. Terms, prices and all details.

1380. Wheat, Oats, Barley and Flour.—A London company, who already import Canadian grain, would be glad to increase their connection by getting into touch with a few first-class shippers of wheat, oats, barley and flour.

1381. Chocolate.—A Japanese import firm, interested financially in a large biscuit company, desire to receive samples and prices of manufacturers' chocolate in bricks or bars. C.i.f. quotations per 100 pounds are requested.

1382. Ego (Powdered Eggs).—A firm in Tokyo supplying certain quantities of food products to the naval authorities have made inquiries for "Ego," a powdered egg product. Samples and prices requested immediately.

1383. Apples.—A firm in Santos, Brazil, wish to hear from Canadian exporters of apples.

1384. Packing-house Products.—A concern in Milan wish to import packing-house products from Canada.

Miscellaneous

1385. Aluminium Knotched Bars.—A London firm desire the addresses of actual Canadian manufacturers of aluminium knotched bars.

1386. Asbestos Yarns.—A Bristol firm are desirous of getting into touch with Canadian manufacturers of asbestos yarns of various types.

1387. Bale Ties.—A Bristol firm of importers, with a London branch, desire to receive quotations on bale ties in 9-foot lengths, 14-gauge, black annealed wire. Prices may be forwarded to the Trade Commissioner at Bristol.

1388-1390. Lumber for Aviation.—Three Italian companies are anxious to receive offers from Canadian exporters of lumber for aviation.

1391. Mica.—A large Anglo-American concern located in Tokyo, who have been largely interested in the import of Indian mica, would be pleased to take up the Canadian product if they are furnished with a range of samples and quotations, together with particulars *re* packing, etc.

1392. Mica.—An old-established British engineering firm desire to receive samples of electrical mica in sizes 1 inch by 2 inches and 8 inches by 10 inches. The samples should be cut and only of the best quality. Prices and full particulars are requested.

1393. Piano Actions and Parts.—A Rio de Janeiro firm wish to hear from Canadian manufacturers of piano actions and parts.

1394. Paper, Cardboards and Chemical Wood-pulp are required by an Italian concern.

1395. Pliers.—A Bristol firm of importers desire to receive quotations from Canadian manufacturers of cutting pliers of the open-throat and closed-in handle type; size 8 inches. Prices delivered Bristol should be in vicinity of £3 per dozen.

1396. Steel Nuts and Washers.—A Japanese firm in Osaka would be glad to hear from Canadian manufacturers of nuts and washers of all kinds who wish representation in Japan. Prices and full particulars requested immediately.

1397. Surgeons' Rubber Gloves.—A Tokyo firm would be glad to receive samples and prices of Canadian-made rubber gloves for surgical purposes. If prices are competitive with other sources of supply, the possibilities for business are promising.

1398. Hot-water Bottles.—One of the leading Japanese pharmaceutical importers is desirous of receiving from Canadian manufacturers catalogues, samples and prices of hot-water bottles.

1399. Spraying Materials.—A firm in Johannesburg, South Africa, would like to represent Canadian exporters of arsenate of lead, paste and powder, bordeaux mixture, lime and sulphur, etc.

1400. Textile Goods.—A firm in Zanzibar, East Africa, would like to get in touch with Canadian exporters of blankets, khaki, drill, shirtings, and native cloths.

1401. Woollen Blankets.—A British firm with many years' experience in the East desire to receive samples and prices of white woollen blankets. If prices and quality are competitive with British goods, there is likelihood of much business.

1402. Water Meters.—A Japanese importer, specializing in the import of supplies required by municipalities and particularly water works, desires to hear from Canadian manufacturers of water meters. Particulars as to quantity, type, price, etc., may be had on application to the Department of Trade and Commerce.

1403. Flour- and Paper-making Machinery, Insulators and Small Refrigeration Plants.—A well-known consulting engineer in Calcutta wishes to receive specifications of flour- and paper-making machinery, insulators and small refrigeration plants for installation in India by his clients.

1404. General Hardware.—A firm in Zanzibar, East Africa, would like to get in touch with Canadian exporters of cutlery, lanterns, lamps, stoves, aluminium-ware, girdle leather bands, electrical goods, etc.

1405. Tubes.—A Dutch firm of good standing are desirous of getting into touch with Canadian manufacturers of tubes; prices and all details.

1406-1407. Bristles and Horse-hair.—Two Manchester firms are open to consider prices and samples of bristles for brush-making, horse-hair (tail). Prices should be c.i.f. Manchester.

1408. General Hardware Lines.—A Manchester firm are open to purchase the following, or would act as agents for: wire nails, bolts, nuts, clothes pegs, chair seats, lawn mowers, wood handles, etc.

SWEDEN'S FARM IMPLEMENT INDUSTRY

Some years ago, says *Kelly's Monthly Trade Review*, several of the best-known concerns manufacturing agricultural machinery and implements formed a combine, the purpose of which was the development of the Swedish export trade in these articles. A report, recently obtained, dealing with the experience obtained by this export association does not seem particularly encouraging, very serious reverses having been sustained during the last two years, chiefly owing to business depression after the war and the difficulty in raising sufficiently cheap working capital. While it is stated that several of these large concerns forming the combine are anxious to break out and once more operate separately, the result of this attempt to form a Swedish cartel proves that the idea—so successfully carried out in its details in Germany, in Russia before the war and in the Baltic States—is not particularly sympathetic to the Swedish mind. The total value of Sweden's annual output of agricultural machinery is unknown, because a considerable percentage of the production is consumed at home and only certain articles sent abroad. The exports during 1920 were valued at 37,979,308 kroner, and in 1921 at 24,676,031 kroner. Denmark, Norway, Finland and the Baltic Republics are the chief markets for Swedish farm implements and cream separators, at least for the time being; but when Russia opens up this market will again become Sweden's foremost customer.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From St. John

To London.—Brecon, Canadian Pacific Steamships, Ltd., March 22; Lord Dufferin, I.C. Transports, Ltd., March 25; Canadian Commander, Canadian Government Merchant Marine, March 28.

To London (via Halifax).—Comino, Furness Line, March 20; Lexington, Furness Line, April 21.

To Manchester (via Halifax).—Manchester Division, Manchester Line, March 17; Manchester Brigade, Manchester Line, March 31; Manchester Producer, Manchester Line, April 14; Manchester Corporation, Manchester Line, April 26.

To Liverpool.—Canadian Ranger, Canadian Government Merchant Marine, March 21; Montclare, Canadian Pacific Steamships, Ltd., March 23; Marloch, Canadian Pacific Steamships, Ltd., March 30.

To Glasgow.—Marburn, Canadian Pacific Steamships, Ltd., March 17; Metagama, Canadian Pacific Steamships, Ltd., March 29; Canadian Voyageur, Canadian Government Merchant Marine, April 7; Marburn, Canadian Pacific Steamships, Ltd., April 19.

To Hull (via Halifax).—Comino, Furness Line, March 20; Lexington, Furness Line, April 12; Ariano, Furness Line, April 24.

To Southampton.—Melita, Canadian Pacific Steamships, Ltd., March 17; Minnedosa, Canadian Pacific Steamships, Ltd., April 7.

To Belfast, Londonderry and Cork.—Ramore Head, Head Line, March 18.

To Dublin, Londonderry and Cork.—Lord Antrim, Head Line, March 25.

To Antwerp.—Melita, Canadian Pacific Steamships, Ltd., March 17; Minnedosa, Canadian Pacific Steamships, Ltd., April 7; Bosworth, Canadian Pacific Steamships, Ltd., April 18.

To Rotterdam.—Rathlin Head, Head Line, March 22; Lord Dufferin, I.C. Transports, Ltd., March 25; Hastings County, I.C. Transports, Ltd., April 21.

To Havana.—A steamer, Nagle & Wigmore, March 30.

To Bermuda, Barbados, Trinidad and Demerara.—Berwyn, Canadian Pacific Steamships, Ltd., March 20 and April 7.

To Hamburg.—Melita, Canadian Pacific Steamships, Ltd., March 17; Essex County, I.C. Transports, Ltd., March 19; Rathlin Head, Head Line, March 22; Lisgar County, I.C. Transports, Ltd., March 31; Brant County, I.C. Transports, Ltd., April 11; Welland County, I.C. Transports, Ltd., April 23.

To Havre and Hamburg.—Essex County, I.C. Transports, Ltd., March 19; Lisgar County, I.C. Transports, Ltd., March 31; Brant County, I.C. Transports, Ltd., April 11; Welland County, I.C. Transports, Ltd., April 23.

To Bordeaux and Dunkirk.—Grey County, I.C. Transports, Ltd., March 31.

To Australia and New Zealand.—Tredennick, New Zealand Shipping Co., Ltd., March 24; Atholl, New Zealand Shipping Co., April 25.

To South Africa.—Jekri, Elder, Dempster & Co., March 31.

To Rio de Janeiro, Santos, Montevideo and Buenos Aires.—Halizones, Houston Line, April 8.

From North Sydney

To St. John's (Nfld.).—Kyle, Reid-Newfoundland Co., Tuesday, Thursday and Saturday every week.

From Halifax

To Liverpool and Queenstown.—Andania, Cunard-Anchor-Donaldson Line, March 19; Megantic, White Star-Dominion Line, March 23; Regina, White Star-Dominion Line, April 2; Canada, White Star-Dominion Line, April 8; Laconia, Cunard-Anchor-Donaldson Line, April 9.

To Plymouth, Cherbourg, and London.—Albania, Cunard-Anchor-Donaldson Line, March 24; Ausonia, Cunard-Anchor-Donaldson Line, April 5.

To Bermuda, British West Indies, and British Guiana.—Royal Mail Steam Packet Co., March 16 and 30, and every fortnight thereafter.

To Barbados, Trinidad and Demerara (British Guiana).—Canadian Beaver, Canadian Government Merchant Marine, Ltd., March 24.

To Australia and New Zealand.—Canadian Explorer, Canadian Government Merchant Marine, Ltd., March 20.

To Hamilton, Nassau, Kingston and Belize.—Canadian Forester, Canadian Government Merchant Marine, Ltd., March 22.

To St. John's (Nfld.).—Sable I., Farquhar Co., Ltd., March 20-29; Belvernon, Tri-National SS. Corporation, March 20-April 3; Canadian Sapper, Canadian Government Merchant Marine, March 29.

From Vancouver

To Yokohama, Kobe, Moji, Shanghai, Manila and Hong Kong.—Hawaii Maru, Osaka Shosen Kaisha, April 4; President Grant, Admiral Oriental Line, April 8.

To Yokohama, Kobe, Nagasaki, Shanghai, Manila and Hong Kong.—Empress of Russia, Canadian Pacific Steamships, Ltd., March 22; Hawaii Maru, Osaka Shosen Kaisha, April 4.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Russia, Canadian Pacific Steamships, Ltd., March 20.

To Yokohama and Kobe.—Toyooka Maru, Nippon Yusen Kaisha, March 18; Kaga Maru, Nippon Yusen Kaisha, March 22; Toyama Maru, Nippon Yusen Kaisha, April 2; Hakata Maru, Nippon Yusen Kaisha, April 28.

To Yokohama, Kobe, Hong Kong and Manila.—Achilles, Blue Funnel Line, April 7; Philoctetes, Blue Funnel Line, April 28.

To Yokohama, Kobe, Moji, Shanghai and Hong Kong.—Africa Maru, Osaka Shosen Kaisha, March 20.

To Dairen (Manchuria).—Africa Maru, Osaka Shosen Kaisha, March 20; Hawaii Maru, Osaka Shosen Kaisha, April 4.

To Honolulu, Suva, Auckland, and Sydney.—Niagara, Canadian-Australasian Royal Mail Line, March 30; Makura, Canadian-Australasian Line, April 27.

To Shanghai, Manila, Hong Kong and Singapore.—Harold Dollar, Canadian Robert Dollar Co., April 5; Stuart Dollar, Canadian Robert Dollar Co., April 22.

To Australian Ports.—Canadian Britisher, Canadian Government Merchant Marine, Ltd., March 20.

To Wellington, Lyttleton, Dunedin, Melbourne and Sydney.—Wairuna, Canadian-Australasian Royal Mail Line, March 30.

To London and Liverpool.—Astronomer, Harrison Direct Line, April 15.

To Bordeaux, Havre, Antwerp, Santander (Spain) and London.—Nevada, Compagnie Générale Transatlantique, March 20; Bordeaux, March 25.

From Victoria

To London and Liverpool.—Astronomer, Harrison Direct Line, April 13.

To Yokohama, Kobe, Shanghai, Manila and Hong Kong.—President Jefferson, Admiral Oriental Line, March 27; President Grant, Admiral Oriental Line, April 8.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Kaga Maru, Nippon Yusen Kaisha, March 22; Iyo Maru, Nippon Yusen Kaisha, April 14.

MOTOR VEHICLES IN KOREA

Epoch-marking developments are taking place in Chosen or Korea, one of the most important factors being the utilization of motor vehicles for transport, says the *British Export Gazette*. All the roads in the country are now under the supervision of the Government, and as a result uniformity in construction is being obtained—a fact of no mean significance where motor traffic is concerned. A 20-years' programme is being carried out, entailing the construction of nearly 8,000 miles of highway. There were barely 500 miles of road in the whole of the country in 1912. Already over 4,000 miles have been completed, and upon these roads 800 motor vehicles are already running. That most of them are of American origin—90 per cent, it is estimated—goes without saying, low price being a desideratum which cannot be ignored in this market. But Chosen will not always be a buyer merely of the cheaper classes of vehicles. The economic developments that are taking place mean an era of much greater prosperity than the present, and with prosperity will come a demand for more luxurious cars, a class of trade for which Great Britain can compete with any country in the world. The market should be carefully watched.

LIST OF ACTS ADMINISTERED AND PUBLICATIONS ISSUED BY THE DEPARTMENT OF TRADE AND COMMERCE

Copyrights Act (a). Cullers Act. Electricity and Fluid Exportation Act (b). Electricity Inspection Act (b). Electric Units Act (b). Gas Inspection Act (b). Gold and Silver Marking Act. Grain Act. Inspection and Sale Act. Inspection of Water Meters Act (d). Lead Bounties Act. Patent Act (a). Petroleum Bounty Act. Statistics Act (c). Trade Mark and Design Act (a). Timber Marking Act (a). Weights and Measures Inspection Act (d). Zinc Bounties Act.

MISCELLANEOUS

Annual Report of the Department of Trade and Commerce.
Annual Report of Board of Grain Commissioners for Canada.
Annual Report *re* **Mail Subsidies and Steamship Subvention.**
List of Licensed Elevators, etc.
Patent Office Record (Weekly) (a).
Annual Report of Weights and Measures, Electricity and Gas (d).
Dominion Grain Research Laboratory (1920).
Grain Inspection in Canada (1914).
Rules and Forms of the Canadian Patent Office (a).
Rules and Regulations made by the Board of Grain Commissioners.
Trial Shipments of Wheat from Vancouver via the Panama Canal to the United Kingdom (1918). (Out of print).

PUBLICATIONS OF THE COMMERCIAL INTELLIGENCE SERVICE (e).

Commercial Intelligence Journal, containing Reports of Trade Commissioners and other Commercial Information.
Apple Market Conditions: Reports from the Canadian Fruit Trade Commissioner at Liverpool (periodically).
Canada-West Indies Conference (1920).
Canadian Economic Commission to Siberia (1919).
Fruit Production in Australia (1922).
German War and Its Relation to Canadian Trade (1914).
Indian Empire as a Market for Canadian Products (1922). (Price outside Canada, 35 cents.)
Mexico as a Field for Exports (1921). (Price outside Canada, 35 cents.)
Markets of Jamaica and the Republic of Colombia, Venezuela, and Panama (1922). (Price outside Canada, 35 cents).
Packing for Overseas Markets (1922). (Price outside Canada, 35 cents.)
Report of Special Trade Commission to Great Britain, France and Italy. (French and English) (1916).
Russian Trade (1916).
Tariffs of the British West Indies (in leaflets).
Trade after the War (1916).
Timber Import Trade of Australia (1917).
Trade between Canada and the British West India Colonies (1920).
Trade of the New Countries of South-east Europe (1921). (Price outside Canada, 35 cents.)
Trading Opportunities in Scandinavia (1922). (Price outside Canada, 35 cents.)
Trading with Egypt (1921). (Price outside Canada, 35 cents.)
Trade with Greece (1921).
Trade with South China (1918).
Trading with Spain (1920).
Trading with Switzerland (1922). (Price outside Canada, 35 cents.)
Toy Making in Canada (1916).
West Africa and Its Opportunities for Canadian Trade (1921). (Price outside Canada, 35 cents.)

PUBLICATIONS OF THE BUREAU OF STATISTICS

The following is an abbreviated list of publications of the Bureau of Statistics. For a complete list, see note (c).
Census of Canada (1911). VI Vols., Bulletins, etc.
Census of Prairie Provinces (1916).
Miscellaneous Statistics respecting the following: Criminal; Education; Finance (Provincial and Municipal); Transportation, including railways and tramways, express, telegraphs, telephones, water, etc.; Production, including agriculture, furs, fisheries, forestry, mining and manufactures; Vital (annual and monthly).
Year Book of Canada.
Report of the Dominion Statistician, Annual.
Trade of Canada (Imports and Exports), Annual and Monthly.
Trade (Internal), including grain, livestock, coal, prices, etc.

NOTE.—(a) Applications should be addressed to: Commissioner of Patents, Ottawa. (b) Applications should be addressed to Director Gas and Electricity Inspection Service, Ottawa. (c) Applications should be addressed to: Dominion Statistician, Ottawa. (d) Applications should be addressed to: Director Weights and Measures Service, Ottawa. (e) Applications should be addressed to the Director, Commercial Intelligence Service, Ottawa.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 285 Beaver Hall Hill, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic.

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address, Canadian.*

Australia.

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium.

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil.

E. L. McColl. Address for letters—Caixa Postal 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies.

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China.

J. W. Ross, Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba.

Address: 400 and 401 Teniente Rey 11, Havana. (Post-office Box 1290.) *Cable Address, Cantracom.*

France.

Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany.

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.

Holland.

Norman D. Johnston, Zuidblaak 26, Rotterdam. *Cable Address, Watermill.*

India and Ceylon.

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy.

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica.

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan.

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico.

C. Noel Wilde. Address for letters, Apartado Num. 126 bis, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian.*

New Zealand.

W. A. Beddoe, Union Buildings, Customs street Auckland. *Cable Address, Canadian.*

South Africa.

W. J. Egan, Westminster House, Adderly street. Cape Town. *Cable Address, Cantracom.*

Straits Settlements.

P. W. Ward, P.O. Box 121, Singapore. (Territory covers Straits Settlements, British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

A. B. Muddiman, Sun Building, Clare Street, Bristol. *Cable Address, Canadian.*

Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States.

Frederic Hudd, 44 Whitehall Street, New York City. *Cable Address, Cantracom.*

CANADIAN COMMERCIAL AGENTS

Australia.

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark.

C. E. Sontum, Grubbegd, No. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies.

R. H. Curry, Nassau, Bahamas.

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

Vol. XXVIII March 24, 1923 No. 999

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

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458

TABLE OF CONTENTS

Commercial Intelligence Journal

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Ottawa **March 24, 1923** **No. 999**

TRADE AND FINANCIAL SITUATION IN GERMANY

Trade Commissioner L. D. Wilgress

Hamburg, February 28, 1923.—The situation in Germany at the end of February is in marked contrast to that of a month ago. On January 31 the exchange value of the mark reached its record low level, the dollar rising to over 48,000 marks. During the first part of February there was a reaction and the mark steadily rose in value. This movement was supported by the Reichsbank who are reported to have thrown reserves of foreign currency on to the market. On February 17 the dollar was quoted as low as 18,500 marks. During the past week the rate has been fairly steady at around 22,600 marks to the dollar.

EFFECT OF THE RISING MARK

The recovery by the mark of over 50 per cent of its depreciation has reacted considerably on trade. At the beginning of February, when the mark was at its low level, prices in Germany were far below those ruling on the world market. Prices, however, soon adjusted themselves to the new level of depreciation, but have not yet reacted to the same extent to the recent improvement in the exchange value of the mark. Consequently prices in Germany for many lines are now above world prices. Import trade, which a month ago was at a standstill, is therefore now fairly active so far as the most necessary articles of importation are concerned. Exports on the other hand are greatly restricted, and German firms are no longer able to undersell foreign competitors so readily as hitherto. Those exporters, who have sold for foreign currency, are faced in most cases with losses due to the rise in the mark.

Even more serious has been the financial loss engendered by the fall in the value of stocks and foreign currencies, in which Germans of all classes have become accustomed to speculate during the last few years. The heavy losses entailed have affected industry to a considerable extent owing to the accumulation of bad debts. For the moment there has been a cessation of buying on the part of the public. While the full effects of this falling off in buying will take some time to reach manufacturers, it is already reported that in certain industries factories have reduced working hours. It would therefore appear that unless further heavy depreciation of the mark sets in the boom period for German industry has come to an end. For this reason the improvement in the value of the mark has not brought about the revival of import trade which might have been expected.

IMPORT TRADE

All German manufacturers are still suffering from the great lack of working capital. On this account, and owing to the prevailing uncertainty, imports of raw materials are limited to minimum requirements. In the case of grain, lard and other foodstuffs, however, the improvement in the value of the mark has resulted in increased import business. Advantage is also being taken of the present situation to make further purchases of coal from England, while Germany has once more resumed the buying of copper and other minerals.

With these exceptions trade, both import and export, must be considered quiet and little improvement is expected until the outlook for the future becomes clearer.

HIGH PRICES

In general the German price level now approximates the world standard and in many cases exceeds it. As an instance meat, which a month ago was about 50 per cent cheaper in Germany than in North America, is now about 25 per cent dearer. Such is the effect of the violent movements in the exchange rate. Butter, eggs, sugar and other necessities of life are now more expensive in Germany than in other countries. There has been some scaling down in prices during the past week, but in only a few lines is this extended to the consumer, retail prices being frequently maintained at the high level.

The wholesale index number on February 17 was 5,338 times that of before the war, while on the same day the dollar was quoted at 4,625 times that of par value. This is the first time for some years that the internal value of the mark has borne so high a ratio in comparison with the external value. Even labour can no longer be considered very cheap as measured in foreign currency. The wages of dock labourers, which are usually the basis for wages in general in Hamburg, are at present 15,000 marks a day. Shipping companies find that the charges for repairs are approximating the rates in other countries, and that it hardly pays to send vessels to Germany solely for the sake of having repairs effected cheaply. Similarly cold storage and warehouse charges have now to be taken into account and approximate more nearly to those in other European ports.

EFFORTS AT STABILIZATION

This approximation of German to world prices must be attributed largely to the policy of the Reichsbank in supporting the exchange value of the mark and to the praiseworthy attempt to bring about some degree of stabilization. The important question is how long the improved value of the mark can be maintained. For this purpose the Government are now arranging for the flotation of an internal gold loan of $50,000,000, to be subscribed to by the leading German bankers. The details regarding this loan have been practically completed and await parliamentary sanction. It is stated that the proceeds of the loan are to be used as a reserve to be drawn upon as occasion requires for supporting the exchange value of the mark.

So far the attempt to bring about stabilization must be credited with a certain amount of success. Although export trade has suffered thereby, this must be considered inevitable. Once the process is completed, German prices will become readjusted to the world level and trade can be conducted upon a secure basis. Speculation has been effectively curbed for the time being, and after recent experiences the public are not apt to become readily affected again with the speculation fever. It is, however, considered doubtful that the Government can prevent a further decline in the exchange value of the mark. While Germany is temporarily freed from reparation money payments, the occupation of the Ruhr and the isolation of this vital industrial district from the rest of Germany has seriously impaired the country's capacity for export. Nor has there yet been any visible check to the inflation of the currency. The return of the Reichsbank for February 15 showed that the total amount of notes in circulation was 2,703,794,687,000 marks. This represents an increase during the week of 450,831,325,000 marks, which is equivalent to a daily issue of about 65,000,000,000 marks. Notes of the denomination of 50,000 marks are now being printed. At the present rate of exchange the above total note circulation has a sterling value of about £27,000,000, while the gold reserves of the

Reichsbank amount to £50,000,000. At the beginning of February the note circulation at the then prevailing rate of exchange was the equivalent of about £8,500,000.

CONSEQUENCES OF RUHR OCCUPATION

Little reference has so far been made to the French occupation of the Ruhr. The direct effects on trade of the fluctuating exchange have been more noticeable during February than the direct consequences of the French action in the Ruhr area. None the less the cutting off of this area from the rest of Germany will henceforth be felt in increasing severity. In a former report reference was made to the coal situation and to the large imports of English coal which the Ruhr occupation has made necessary. Increasing quantities of pig iron, bar iron, sheets, wire, etc., are being imported from Austria and Czecho-Slovakia to make up for the deprivation of Rhenish-Westfalian supplies. It will probably be some time before any shortage of semi-manufactured materials will be experienced, as the manufacturers in unoccupied Germany prepared beforehand for the events now taking place in the Ruhr and accumulated supplies. It is evident, however, that the continuance of French occupation will lead to considerably greater quantities of iron and other semi-manufactured materials being imported from foreign countries. Germany would in such a case assume the role of a producer chiefly of finished articles, the materials for which would be supplied from abroad. What effect this would have on German export trade as a whole remains to be seen, but it is apparent that German goods would have to compete on the world's markets on more even terms than has been the case during the last three years, when the depreciated currency enabled German exporters easily to undersell competitors.

The situation in the iron and steel industry of the Ruhr area itself is very uncertain owing to the refusal of the industrialists to pay export duties on shipments to unoccupied Germany. The blast furnace works have cancelled contracts for Lorraine iron ore and have extended their contracts for Swedish ore up to 1932 at a price of 13 Swedish crowns a ton c.i.f. Swedish port. Large quantities of Newfoundland iron ore have also been contracted for.

SOCIAL SITUATION

The social situation in unoccupied Germany remains fairly satisfactory. The Government by completing half its programme for the purchase of 2,500,000 tons of foreign grain has assured supplies up to the next harvest. The remainder of the programme calls for the buying of grain to be used as a reserve until the yield of the next harvest can be consumed. Reports of social unrest in Germany have been greatly exaggerated, and it is evident that the communist element comprises only a very small proportion of the population. So long as food supplies are assured and political passions are not aroused, there need be little fear of the outbreak of serious disorders. In the meantime the opposition to French action in the Ruhr has brought about a greater degree of unity in Germany than has existed since the Revolution.

SOUTH AFRICAN WEIGHTS AND MEASURES ACT

With reference to the article in *Commercial Intelligence Journal* No. 980, November 11, 1922, pages 780-1, on the Weights and Measures Act of the Union of South Africa, Mr. James Cormack, Assistant Trade Commissioner, writing from Cape Town on February 12, says: "Information has been received from the Customs authorities that it has been decided that the use of the term 'cwt.' should be discontinued in connection with goods imported in the new 100 pounds hundredweight, and that the word 'cental,' or abbreviation 'ct.,' be used in place thereof."

PURE FOOD REGULATIONS IN URUGUAY

An Uruguayan decree, dated 2nd October last, approved detailed regulations regarding the manufacture and sale in Uruguay and importation into the Republic of foodstuffs and beverages, viz., alcohol, alcoholic and other beverages; ice; sherberts; milk and milk products; edible oils and fats; manufactured meat products and preserved foods; sugar, molasses, and glucose; honey, jams, marmalades, jellies, and confectionery; dried fruits; cocoa and chocolate; pastry-cook's wares and biscuits; flour, starches, feculæ, and semolina; bread; edible pastes; tea, coffee, and coffee substitutes; spices; maté; and cooking salt.

The regulations contain definitions of each commodity, prescribe the standard of purity with which each must comply, and deal also with the requirements (from a public health point of view) with which packing of foodstuffs and beverages (e.g., tins, cans), and other articles used in connection with foodstuffs (e.g., copper and brass utensils used in preparing certain foodstuffs) must comply.

Imported foodstuffs and beverages are to be subject to inspection by the Customs analysis officers who are charged with the administration of the regulations so far as imported goods are concerned.

CONVENTION OF COMMERCE BETWEEN CANADA AND FRANCE, 1922.*

PARTICULARS RELATING TO CUSTOMS TARIFF RATES IN FRANCE.

(1) Canadian products enumerated in Schedule A when imported into France.

(2) Canadian products enumerated in Schedule B when imported into France, which shall enjoy the benefit of the percentages of reduction, such percentages to bear on the difference between the rates of the General Tariff and those of the Minimum Tariff.

If France shall at any time grant to the United States of America percentages more favourable or the benefit of the minimum tariff the same or similar products originating in or coming from Canada shall enjoy the benefit of such concessions.

(3) All products originating in and coming from Canada other than those mentioned in Schedules A and B to this Convention shall be subject in France to the rates of the general tariff of 1910 as long as by virtue of the French decree of March 28th, 1921, such tariff shall continue to be applicable to the products of the United States of America other than those specified in Schedule A and Schedule B to the French law of March 29th, 1910.

*Compiled by Mr. J. A. Russell, Commissioner of Tariff, Department of Finance. Tabled in the House of Commons on March 19.

The 1922 Convention of Commerce between Canada and France was published in full in *Commercial Intelligence Journal* No. 993 (February 10, 1923).

CONVENTION OF COMMERCE BETWEEN CANADA AND FRANCE, 1922.

Particulars Relating to Customs Tariff Rates in France

Canadian products enumerated in Schedule A when imported into France.

Number of the French Tariff	Products	French Tariff — General	French Tariff — Minimum	Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States products
		Francs	Francs	Francs	Francs	Francs
1	Horses..........head	225	150	150	150	225
	"	150	100	100	100	150
	"	75	50	50	50	75
17	Ham, boned and rolled; cooked hams, meat, salted, per 100 kilogs..........	60	40	40	40	60
	Per 100 kilogs..........	50	35	35	35	50
18 ter	Poultry, truffled, per 100 kilogs..........	270	180	270	180	270
19	Meat, preserved in tins per 100 kilogs...	23	20	20	20	20
20	Extract of meat, in cakes, or otherwise, per 100 kilogs..........	40	30	30	30	3
20 bis	Guts, per 100 kilogs., dried, etc..........	15	10	10	10	10
	Per 100 kilogs., fresh..........	10	5	5	5	5
Ex 26	Bed feathers, per 100 kilogs..........	2·50	Free			
		200·00	50	50	50	50
Ex 30	Lard, per 100 kilogs..........	40	30	30	30	30
Ex 34	Eggs of poultry or game, per 100 kilogs..	10	6	6	6	10
Ex 36	Cheese, Canadian, per 100 kilogs..........	35	15	15	15	35
41	Bone black (animal black), per 100 kilogs	3	2	2	2	3
45	Fresh fish (sea water), per 100 kilogs....	40	20	20	20	40
46	Fish, dried, salted or smoked, per 100 kilogs..........	60	48	48	48	60
	Stock fish, per 100 kilogs..........	48	15	15	15	48
	Herrings, per 100 kilogs..........	20	15	15	15	20
	Other, per 100 kilogs..........	50	25	25	25	50
49	Lobsters, fresh, preserved or prepared, per 100 kilogs.—					
	Prepared..........	40	25	25	25	40
	Fresh..........	40	15	15	15	40
51	Fish oils, per 100 kilogs..........	7	6	6	6	7
52	Spermaceti, per 100 kilogs.—					
	Crude..........	6	5	5	5	6
	Pressed..........	12	10	10	10	12
	Refined..........	19	15	15	15	19
53	Roe of cod and mackerel, per 100 kilogs.	80	50	50	50	80
64 bis.	Casein, hardened, etc., per 100 kilogs...	750	375	750	375	750
	In tubes, etc..........	600	150	600	150	225
68	Wheat, spelt and meslin (grain flour), per 100 kilogs.—					
	Wheat..........	7	7	7	7	7
	40 % flour and above..........	16	16	16	16	16
69	Oats, per 100 kilogs..........	6	6	6	6	6
	Meal, per 100 kilogs..........	10	10	10	10	10
70	Barley, per 100 kilogs..........	6	6	6	6	6
	Meal, per 100 kilogs..........	10	10	10	10	10
71	Rye, per 100 kilogs..........	6	6	6	6	6
	Meal, per 100 kilogs..........	10	10	10	10	10
72	Maize, per 100 kilogs..........	6	6	6	6	6
	Meal, per 100 kilogs..........	10	10	10	10	10
73	Buckwheat, per 100 kilogs..........	5	5	5	5	5
	Meal, per 100 kilogs..........	8	8	8	8	8
84	Table fruits, fresh, per 100 kilogs.—					
	Apples..........	10	2·50	2·50	2·50	2·50
	Peaches..........	24	6	6	6	6
85	Table fruits, dried or drained, per 100 kilogs.—					
	Apples, etc..........	40	10	10	10	10
	Apricots..........	48	12	48	12	12

Canadian products enumerated in Schedule A—*Continued.*

Number of the French Tariff	Products	French Tariff General	French Tariff Minimum	Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States products
		Francs	Francs	Francs	Francs	Francs
86	Table fruits, candied or preserved, per 100 kilogs.—					
	In spirits	320	80	80	80	100
	Not specified	32	8	8	8	10
91	Sugar, per 100 kilogs	90	90	90	90	90
93	Syrups, bonbons, candied fruits, per 100 kilogs	210	210	210	210	210
95	Preserves, per 100 kilogs	70	70	70	70	70
Ex 96	Coffee, roasted or ground, per 100 kilogs.	400	400	400	400	400
Ex 110	Oil, linseed, cotton seed, sesame and maize, per 100 kilogs.—					
	Linseed	72	18	18	18	18
	Cotton seed	72	18	18	18	18
	Cotton seed and sesame	72	18	18	18	18
	Maize for soap	72	18	18	18	18
	Maize, other	180	45	180	45	45
115 bis.	Tar, per 100 kilogs	12	3	3	3	4
117	Balsams, per 100 kilogs	40	10	40	10	10
Ex 128	Woods, common: Logs, rough, not squared, with or without the bark, of any length, and of a circumference at the thickest end of more than 60 centimetres per 100 kilogs	2·60	·65	·65	·65	·65
	Wood, squared or sawn, 80 millimetres in thickness and above, per 100 kilogs.	5	1·25	1·25	1·25	1·25
130	Stave wood, per 100 kilogs	3	·75	·75	·75	·75
131	Splints, per 100 kilogs	6	1·50	1·50	1·50	2·00
132	Hopwood and prepared poles, per 100 kilogs	14	3·50	3·50	3·50	4
133	Perches, poles, and staffs, rough, etc., per 100 kilogs	1·20	·30	·30	·30	·45
135	Logs of 1 m. 10 c. in length or less, per 100 kilogs	·80	·80	·80	·80	·80
135 bis.	Resinous woods in logs, etc., per 100 kilogs	·03	·02	·02	·02	·03
136	Charcoal and charred boon, per 100 kilogs	4	1	1	1	1·50
137	All other common woods	Free	Free	Free	Free	Free
158 bis.	Cabbage for sauerkraut, per 100 kilogs.	8	2	8	·40	·40
164	Fodder, turf for litter and dried beetroot pulp, per 100 kilogs	2	·50	·50	·50	·75
168	Cellulose pulp, per 100 kilogs—					
	Dry	1·50	1	1·00	1	1·50
	Moist	·75	·50	·50	·50	·75
	Treated chemically	2·50	2·00	2·00	2·00	2·50
178 bis.	Corundum in grits, emery, in powder, per 100 kilogs	44·8	11·2	44·8	11·2	44·8
178 ter	Emery on paper, etc., per 100 kilogs	324	81	81	81	81
190	Coal, per 1,000 kilogs	12	12	12	12	12
192	Coal tar	Free	Free	Free	Free	Free
194	Mineral wax or ozokerite, per 100 kilogs—					
	Raw	40	10	40	10	12
	Refined	160	40	160	40	50
197	Petroleum, schist and other mineral illuminating oils, per hectolitre	18	9	9	9	9
	Refined per 100 kilogs	25	10	10	10	10
198	Heavy oils and residue of petroleum and other mineral oils, per 100 kilogs	36	27	27	27	27
203	Aluminium, per 100 kilogs—					
	Ingots, etc	800	200	800	200	300
	Forged, etc	900	225	900	225	336
	Hammered in leaves	6,400	1,600	6,400	1,600	2,400
	Wire	1,000	250	1,000	250	375
221	Copper, per 100 kilogs—					
	Rolled, etc	86·4	21·6	21·6	21·6	21·6
	Rolled	96	24	24	24	24
	Rolled, in plates	110·4	27·6	27·6	27·6	27·6
	Rolled, in plates	138	34·5	34·5	34·5	34·5
	Wire	120	30	30	30	30
		150	37·50	37·50	37·50	37·50

CANADIAN products enumerated in Schedule A—*Continued.*

Number of the French Tariff	Products	French Tariff: General	French Tariff: Minimum	Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States products
		Francs	Francs	Francs	Francs	Francs
221	Copper, per 100 kilogs—*Concluded.*					
	Drawn, rolled or spun	400	100	100	100	100
	Bronze powder	800	200	200	200	200
222	Lead, per 100 kilogs—					
	Pigs, bars, etc., argentiferous	10	2·50	2·50	2·50	3·00
	Other, not argentiferous	14	3·50	14·00	3·50	4·00
	Hammered or rolled	67·6	16·9	16·9	16·9	18·2
224	Zinc, per 100 kilogs, rolled	48	12	48	12	12
225	Nickel, per 100 kilogs—					
	Hammered, etc	40	10	10	10	10
	Wire	60	15	15	15	15
227	Antimony, metallic, per 100 kilogs	24	6	6	6	6
021	Other ammonia salts, per 100 kilogs	96	24	96	24	24
022	Other ammonia salts, per 100 kilogs	96	24	96	24	24
0148	Oxides of nickel	20%	5%	5%	5%	5%
0149	Sulphates of nickel (single and double)	20%	5%	5%	5%	5%
0175	Oxide of zinc, per 100 kilogs	48	12	48	Free	Free
0187	Ethyl chloride	40%	10%	10%	10%	10%
0194	Methylic alcohol, crude (methylene), per 100 kilogs	184	46	184	46	46
0195	Methylic alcohol, rectified, per 100 kilogs	370	92·50	370	92·50	92·50
0199	Hexamethylenetetramine and its derivatives, per 100 kilogs	40	10	10	10	10
0201	Acetate of methyl per 100 kilogs	120	30	30	30	30
0202	Solvents with an acetone and methyl acetate basis, per 100 kilogs	80	20	20	20	20
0204	Acetic anhydride, per 100 kilogs	350	87·50	87·50	87·50	87·50
0373	Wood creosote	40%	10%	10%	10%	10%
0381	Chemical products not specially mentioned	60%	15%	15%	15%	15%
298	Varnish and assimilated paints, per 100 kilogs—					
	Varnish	720	180	612	180	180
	Other	720	180	720	180	180
307	Talc pulverized, per 100 kilogs	8	2	8	1·75	1·75
312	Soaps, other than perfumed, per 100 kilogs.	72	18	18	18	18
315	Distilled waters, per 100 kilogs	40	10	10	10	12
316	Not specified	60%	15%	15%	15%	20%
318	Starch, per 100 kilogs	388·8	97·2	97·2	97·2	118·8
324	Glue manufactured from tendons of whales, etc	20%	5%	5%	5%	5%
325	Glue made from bones, sinews, skin, etc.	20%	5%	12½%	5%	5%
347	Porcelain, per 100 kilogs—					
	Whole	76	19	76	19	23·75
	Decorated	256	64	256	64	80
	Decorated, etc	192	48	192	48	57
	Parian	320	80	320	80	96
359	Bottles, etc., per 100 kilogs—					
	Capacity of ½ litre	56	14	56	14	21
	Capacity of less than ½ litre	60	20	60	20	30
361	Incandescent electric lamps, per 100 kilogs—					
	With mountings	7,420	1,855	1,855	1,855	2,782·50
	With mountings	5,800	1,450	1,450	1,450	2,175
	Without mountings	7,560	1,890	1,890	1,890	2,835
Ex 363	Yarns of linen, not glazed, single, unbleached, in skeins up to 5,000 metres, etc., per 100 kilogs	320	80	80	80	120
Ex 363	Yarns of linen, not glazed, single, unbleached, in skeins up to 5,000 metres, etc, per 100 kilogs	360	90	90	90	135
Ex 363 bis.	Yarns of linen, not glazed, twisted, unbleached, in skeins up to 5,000 metres, etc., per 100 kilogs	416	104	104	104	160
Ex 363 bis.	Yarns of linen, not glazed, twisted, unbleached, in skeins up to 5,000 metres, etc., per 100 kilogs	468	117	117	117	175
366 bis.	Yarns of phormium tenax, etc., per 100 kilogs	132	33	33	33	33

Canadian products enumerated in Schedule A—*Continued*

Number of the French Tariff	Products	French Tariff General	French Tariff Minimum	Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States products
		Francs	Francs	Francs	Francs	Francs
366 bis.	Yarns of phorium tenax, etc., per 100 kilogs	171·6	42·9	42·9	42·9	42·9
421	Ribbons, inked, etc., for typewriting and calculating machines, etc., per 100 kilogs	9,600	2,400	9,600	2,400	2,400
461	Paper and card, per 100 kilogs—					
	Machine made	120	30	30	15	15
	Machine made	180	45	45	23	23
	Cigarette paper	240	60	60	60	90
	Cigarette paper	300	75	75	75	111
	Hand made	180	45	45	45	69
	Sulphurized	240	60	60	30	30
	Fancy paper	360	90	90	45	45
	Fancy paper	720	180	180	90	90
	Coloured and cut up	540	135	135	135	180
461 ter	Duplicating paper, etc., per 100 kilogs	720	180	720	180	180
461 quater	Albumenized photographic paper, sensitized, etc., per 100 kilogs	1,600	400	1,600	400	400
	Films sensitized	3,040	760	3,040	760	760
	Carbon	800	200	800	200	200
	Sensitized	360	90	360	90	90
462	Cardboard: in sheet or plates, etc., per 100 kilogs—					
	Fancy	192	48	48	48	72
477	Artificial leather, common, etc., per 100 kilogs	120	30	30	30	45
	Unworked	344	86	344	86	129
	Worked	430	107·50	430	107·50	172
Ex 493	Peltries, prepared, etc., per 100 kilogs	400	100	100	100	125
504	Movements of table or wall clocks, etc., per 100 kilogs	2,500	625	2,500	625	1,000
505	Electrometers, etc., small, each, per 100 kilogs	40	10	40	10	10
	Parts of	90%	35%	90%	35%	35%
	Larger meters, per 100 kilogs	600	150	600	150	150
506	Tower clocks, per 100 kilogs	320	80	320	80	104
510	Steam engines, stationary and marine, etc., per 100 kilogs—					
	With pistons	148·80	37·20	37·20	37·20	37·20
	"	173·60	43·40	43·40	43·40	43·40
	"	198·40	49·60	49·60	49·60	49·60
	"	223·20	55·80	55·80	55·80	55·80
	"	322·40	80·60	80·60	80·60	80·60
	"	446·40	111·60	111·60	111·60	111·60
	"	496	124	124	124	124
	Without pistons	223·20	55·80	55·80	55·80	55·80
	"	260·40	65·10	65·10	65·10	65·10
	"	297·60	74·40	74·40	74·40	74·40
	"	334·80	83·70	83·70	83·70	83·70
	"	483·60	120·90	120·90	120·90	120·90
	"	669·60	167·40	167·40	167·40	167·40
	"	744	186	186	186	186
512	Traction engines and rollers, per 100 kilogs	204	51	51	51	51
	Locomotives, narrow gauge	230·4	57·6	57·6	57·6	57·6
	Standard gauge	192	48	48	48	48
	Other	294·40	73·60	73·60	73·60	73·60
513	Tenders for steam locomotives, per 100 kilogs	134·40	33·60	33·60	33·60	33·60
521	Printing presses and machines, etc., per 100 kilogs	108	27	108	27	27
522	Agricultural machines (not including motors), per 100 kilogs	96	24	24	24	24
	Other	228	57	57	57	57
	Separators, etc	60%	15%	15%	15%	15%
525	Machine tools, per 100 kilogs	132	33	82·50	33	33

Canadian products enumerated in Schedule A—*Continued*

Number of the French Tariff	Products	French Tariff: General	French Tariff: Minimum	Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States products
		Francs Per 100 kilogs.	Francs Per 100 kilogs.	Francs Per 100 kilogs.	Francs Per 100 kilogs.	Francs Per 100 kilogs.
525 ter	*Typewriters, etc., 50 kilogs or more...	2,000	500	2,000	500	500
	Less than 50 kilogs....................	3,000	750	3,000	750	750
525 quat.	Machines for rinsing, corking, etc......	256	64	64	64	64
526 quinq.	Open boilers, etc........................	104·40	26·10	80·91	26·10	26·10
533	Component parts of machines, of steering, etc., of wrought or stamped iron or steel, of malleable cast iron, etc.					
	More than 1,000 kilogs—					
	Rough..............................	115·20	28·80	28·80	28·80	28·80
	Worked.............................	187·20	46·80	46·80	46·80	46·80
	More than 300 kilogs.—					
	Rough..............................	144	36	36	36	36
	Worked.............................	216	54	54	54	54
	More than 100 kilogs.—					
	Rough..............................	172·80	43·20	43·20	43·20	43·20
	Worked.............................	244·80	61·20	61·20	61·20	61·20
	More than 15 kilogs.—					
	Rough..............................	201·60	50·40	50·40	50·40	50·40
	Worked.............................	360	90	90	90	90
	More than 1 kilog.—					
	Rough..............................	230·40	57·60	57·60	57·60	57·60
	Worked.............................	388·80	97·20	97·20	97·20	97·20
	1 kilog or less—					
	Rough..............................	288	72	72	72	72
	Worked.............................	576	144	144	144	144
535	Component parts of copper, pure or alloyed, moulded, wrought, etc., 10 kilogs—					
	Rough..............................	216	54	216	54	54
	Worked.............................	360	90	360	90	90
	Less than 10 kilogs.—					
	Rough..............................	230·40	57·60	230·40	57·60	57·60
	Worked.............................	504	126	504	126	126
	1 kilog. and less—					
	Rough..............................	288	72	288	72	72
	Worked.............................	576	144	576	144	144
	†Note.—Part of this item was minimum tariff.					
535 bis.	Component parts of machines and shafting, not specified, of two or more metals, etc.—					
	300 kilogs. and more...................	210	52·50	131·25	25·50	25·50
	More than 50 kilogs...................	280	70	175	70	70
	More than 10 kilogs...................	420	105	262·50	105	105
	More than 1 kilog.....................	490	122·50	306·25	122·50	122·50
	1 kilog. and less.....................	560	140	350	140	140
536	Dynamo armatures and component parts, etc., per 100 kilogs.—					
	1,000 kilogs. and over.................	550	550	550	550	550
	50 kilogs and over....................	180	180	180	180	180
	Less than 50 kilogs...................	390	390	390	390	390
537	Tools, with or without handles, etc., per 100 kilogs.—					
	Spades, shovels and mattocks........	288	72	72	72	108
	Scythes and sickles..................	312	78	78	78	117
	Saws, circular........................	560	140	140	140	212
	Saws, hand............................	400	100	100	100	152
	Files and rasps.......................	384	96	96	96	144
	Files and rasps.......................	512	128	128	128	192
	Vices, etc.—					
	15 kilogs. and more..................	240	60	60	60	100
	3 kilogs and more....................	400	100	100	100	152
	More than 1 kilog....................	560	140	140	140	212
	1 kilog. or less......................	720	180	180	180	272
	Twist drills, etc......................	80%	20%	20%	20%	30%
	Shear blades..........................	480	120	120	120	180
	Other tools............................	352	88	88	88	132

*Typewriters without nickel parts are entitled to minimum tariff under 1921 agreement.

56561—2½

Canadian products enumerated in Schedule A—*Continued*

Number of the French Tariff	Products	French Tariff General	French Tariff Minimum	Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States products
		Francs	Francs	Francs	Francs	Francs
539	Stereotype blocks, plates, etc., for printing, per 100 kilogs	1,800	450	450	450	450
546	Pins, etc., per 100 kilogs.—					
	Safety	1,400	350	1,400	350	525
	All others	1,500	375	1,500	375	564
546 bis.	Buckles, clasps, hooks, etc., per 100 kilogs.—					
	Rough	1,340	335	1,340	335	502·50
	Whitened	900	225	900	225	339
	Covered	4,690	1,172·50	4,690	1,172·50	1,495·10
556	Manufactures of case-hardened cast-iron, rough, per 100 kilogs.—					
	More than 500 kilogs	84·80	21·20	84·80	21·20	21·20
	From 100 kilogs	169·60	42·40	169·60	42·40	42·40
	Less than 100 kilogs	233·20	58·30	233·20	58·3	58·30
	Trimmed—					
	More than 500 kilogs	254·40	63·60	254·40	63·60	63·60
	From 100 kilogs	360·40	90·10	360·40	90·10	90·10
	Less than 10 kilogs	466·40	116·60	466·40	116·60	116·60
558	Building materials of iron or steel for building purpose, etc., per 100 kilogs	176·40	44·10	176·40	44·10	58·80
558 bis	Small articles not specified, of iron or steel, etc., per 100 kilogs	304	76	304	76	114
558 ter	Iron-work for carriages, etc., 15 kilogs or more	254·40	63·60	63·60	63·60	63·60
	Less than 15 kilogs	318	79·50	79·50	79·50	79·50
559	Locks, entirely of iron, per 100 kilogs	366	91·50	256·20	91·50	91·50
	With iron, etc	488	122	341·60	122	122
	Without lever tumblers	610	152·50	427	152·50	152·50
	With lever tumblers	732	183	522·40	183	183
559 bis.	Padlocks, per 100 kilogs with case entirely of iron	366	91·50	256·20	91·50	91·50
	With lever tumblers	488	122	341·60	122	122
	With other cases					
	Without lever tumblers	610	152·50	427	152·50	152·50
	With lever tumblers	732	183	522·40	183	183
568	Household wares and all articles of iron, steel, etc., per 100 kilogs—					
	Not painted or polished	238	59·50	184·45	59·50	59·50
	Painted, polished, etc	252	63	195·30	63	63
	Varnished	280	70	217	70	70
	Enamelled, plain, etc	392	98	98	98	98
	Coppered, etc	420	105	325·50	105	105
	Enamelled, decorated without gold	490	122·50	122·50	122·50	122·50
	In plain sheets, etc	490	122·50	379·75	122·50	122·50
	Others	560	140	434	140	140
	Enamelled, etc., with gold, in plain sheets	560	140	140	140	140
	Others	630	157·50	488·25	157·50	157·50
	Reservoirs, etc	240	60	186	60	60
569	Coffee-mills, etc., per 100 kilogs	192	48	192	48	48
570	Apparatus for water closets, lever or balance, etc., per 100 kilogs	156	39	156	39	51
574	Lamp-makers' and tinsmiths' wares, etc. per 100 kilogs	396	99	396	99	132
585 bis.	Detonators for mines with an electric priming, per 100 kilogs	1,520	380	1,520	380	570
588	Miners' fuses, per 100 kilogs.—					
	Ordinary	360	90	360	90	105
	Tape	540	135	540	135	150
	Gutta-percha	900	225	900	225	240
Ex 592	Furniture other than bent wood: other than chairs, veneered on one or both sides, in all woods, pieces and separate parts per 100 kilogs—					
	Carved, consol-tables, etc	600	150	600	150	150
	Others	360	90	360	90	90
	Moulded	144	36	90	36	36
	Varnished, etc	115·2	28·8	72	28·8	28·8

Canadian products enumerated in Schedule A—*Continued.*

Number of the French Tariff	Products	French Tariff: General	French Tariff: Minimum	Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States products
		Francs	Francs	Francs	Francs	Francs
592 bis.	Other than bent wood: other than chairs, massive, and pieces, and separate parts, per 100 kilogs.—					
	Massive, consol-tables, etc	600	150	150	150	150
	" other	360	90	90	90	90
	" moulded	144	36	36	36	36
	" varnished	115·2	28·8	28·8	28·8	28·8
	" others	13·5	9	9	9	9
593	Furniture, covered (garnis) and upholstered, of all kinds, per 100 kilogs. Plus 15 per cent over rates of items 592 and 592 bis.					
593 bis.	Canned put together or not or parts of such furniture, per 100 kilogs. Plus 15 per cent over rates of items 592 and 592 bis.					
600	Wood, planed, grooved, and (or) tongued, etc., per 100 kilogs.—					
	Of oak or hard wood	44	11	11	11	16·5
	Of fir or other soft wood	30·8	7·7	7·7	7·7	11·55
601	Doors, windows, Venetian blinds, etc., per 100 kilogs.—					
	Of hard wood, etc	208	52	52	52	78
	Of soft wood	130	32·5	32·5	32·5	48·4
	Painted	312	78	78	78	117
	Carved	300	75	75	75	112·5
601 bis.	Wood, cut for roller blinds, per 100 kilogs.	7·2	1·8	7·2	1·8	2·25
602	Small wooden wares, per 100 kilogs—					
	Boxes, etc	144	36	36	36	72
	Bobbins, etc	216	54	54	54	90
	Bobbins, etc	72	18	18	18	27·4
	Small reels, etc	54	13·5	13·5	13·5	18
	Other articles, not varnished	54	13·5	13·5	13·5	18
	Varnished	86·4	21·6	21·6	21·6	28·8
Ex 604	Upright pianos	70%	35%	35%	35%	35%
614 ter	Automobiles, chassis, etc., per 100 kilogs.					
	2,500 kilogs or more	360	90	360	90	90
	500 to 2,500 kilogs	180%	45%	180%	45%	45%
	Less than 500 kilogs	180%	45%	180%	45%	45%
	Bodies, etc., per 2,500 kilogs or more, per 100 kilogs—					
	Freight	110·4	27·6	110·4	27·6	27·6
	Passenger	690	172·5	690	172·5	172·5
	Less than 2,500 kilogs	180%	45%	180%	45%	45%
	Carrying frames 2,500 kilogs or more, per 100 kilogs	340	85	340	85	85
	Less than 2,500 kilogs	180%	45%	180%	45%	45%
	Rims of iron, etc., 2,500 kilogs or more, per 100 kilogs, other	81·6	20·4	81·6	20·4	20·4
	Iron or steel, amature, etc	240	240	240	240	240
	Other	88	88	88	88	88
	Less than 2,500 kilogs—					
	In straight bars	81·6	81·6	81·6	81·6	81·6
	Other	180%	180%	180%	180%	180%
	Acetylene headlights, etc., p. 100 kilogs	1,920	480	1,920	480	480
Ex 620	Sheets of india-rubber, pure, not vulcanized and threads of vulcanized india-rubber, per 100 kilogs.—					
	Sheets of india-rubber	136	34	34	34	34
	Threads, etc	36	Free	Free	Free	Free
	Threads, other	160	40	40	40	40 %
620 bis.	Manufactures of amianthus or asbestos, per 100 kilogs.—					
	In sheets, etc	270	67·5	67·5	67·5	102·6
	Shaped, etc	540	135	135	135	202·5
	Threads, etc	792	198	198	198	297
	Plaits, etc	990	247·5	247·5	247·5	346·5

Canadian products enumerated in Schedule A—*Concluded*

Number of the French Tariff	Products	French Tariff		Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States products
		General	Minimum			
		Francs	Francs	Francs	Francs	Francs
620 ter	Mica, in sheets or plates, etc., per 100 kilogs.	350	87·5	87·5	87·5	175
635	Observation, geodetical and optical instruments, etc., levels, etc., per kilog.	12	3	12	3	4·5
	Microscopes, etc., per kilog.	20	5	20	5	7·5
	Photograph instruments, per kilog.	200	50	200	50	75
	Stereoscopes, per 100 kilogs.	600	150	600	150	275
641	Small wares of other materials; tobacco pipes and stems of woods, native or exotic, etc., per 100 kilogs.	576	144	576	144	216
642	Tobacco pipes entirely of wood, per 100 kilogs.	104	26	104	26	39

Canadian products enumerated in Schedule B when imported into France, which shall enjoy the benefit of the percentages of reduction, such percentages to bear on the difference between the rates of the General Tariff and those of the Minimum. If France shall at any time grant to the United States of America percentages more favourable or the benefit of the minimum tariff the same or similar products originating in or coming from Canada shall enjoy the benefit of the said concessions.

Number of the French Tariff	Products	French Tariff		Percentages	Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States products
		General	Minimum				
		Francs	Francs	p.c.	Francs	Francs	Francs
4	Oxen, per 100 kilogs	30	20	85	20	21·50	30
5	Cows, per 100 kilogs	30	20	85	20	21·50	30
6	Bulls, per 100 kilogs	30	20	85	20	21·50	30
7	Steers, bullocks and heifers, per 100 kilogs	30	20	85	20	21·50	30
8	Calves, per 100 kilogs	40	25	85	40	27·25	40
9	Rams, ewes and wethers, per 100 kilogs	40	25	80	40	28	40
10	Lambs, weighing 10 kilogs and less, per head	4	2·25	85	4	2·51¼	4
12	Pigs, per 100 kilogs	25	15	85	25	16·50	25
Ex. 14 bis	Poultry, per 100 kilogs	30	20	50	20	25	30
16	Meat, fresh, including meat preserved by freezing, per 100 kilogs.—						
	Pork	40	25	85	25	27·25	40
	Other	50	35	85	35	37·25	50
17 bis	Pork butchers' products, per 100 kilogs	200	100	80	100	100	100
Ex. 18	Poultry, dead, per 100 kilogs	30	20	50	20	25	30
31	Margarine, oleomargarine, alimentary fats and similar substances, per 100 kilogs	35	25	60	35	29	35
35 bis	Milk, condensed, pure, per 100 kilogs	10	5	50	5	7·50	10
35 ter	(a) Milk, condensed, with an addition of sugar, per 100 kilogs ?	202·5	202·5	50	202·5	202·5	202·5
	(b) Milk food, with an addition of sugar, per 100 kilogs ?	202·5	202·5	75	202·5	202·5	202·5
37	Butter: fresh or melted, or salted, per 100 kilogs.—						
	Fresh	30	20	75	30	22·5	30
	Salted	30	20	75	20	22·5	30
38	Honey, per 100 kilogs.—						
	Pure	80	20	50	20	20	20
	Artificial	396	99	50	99	99	99
47	Fish: preserved by pickling, or otherwise prepared, per 100 kilogs	50	25	60	25	35	50
74	Malt	30%	15%	60	15%	21% or	30%or
	or, per 100 kilogs.					4 francs	4 francs
76	Groats, grits (coarse flour) pearled or clean grain, per 100 kilogs	32	32	60	32	32	32
80	Pulse, beans whole, per 100 kilogs	3	3	85	3	3	3
83	Potatoes, per 100 kilogs	3	·40	85	·40	·79	3
	New potatoes	6	3	85	3	3	3
89	Seeds for sowing, per 100 kilogs.—						
	Clover seed	100	25	80	25	30	30
	Other	12	3	80	3	3	3
98	Chocolate, containing 55% of cane, per 100 kilogs	300	150	85	300	172·5	300
110 bis	Fixed oils, boiled or oxidized, per 100 kilogs	240	60	50	240	69	69
111 bis	Alimentary vegetable fat, per 100 kilogs	35	25	60	35	29	35
Ex 128	Wood, squared or sawn, less than 80 millimetres but exceeding 35 millimetres in thickness, per 100 kilogs	5	1·25	60	1·25	1·25	1·25
	Wood, sawn, 35 millimetres in thickness or less, per 100 kilogs	7	1·75	50	1·75	1·75	1·75
129	Paving blocks, per 100 kilogs	7	1·75	80	1·75	1·75	1·75
136 bis	Straw or wool of wood, per 100 kilogs.—						
	Not dyed	16	4	60	4	6·00	6·00
	Dyed	19·2	4·80	60	4·80	7·20	7·20
158	Vegetables: fresh, salted or pickled, preserved, dried, per 100 kilogs. Preserved	192	48	85	48	54	54
160	Hops, per 100 kilogs	140	35	80	35	35	35
161	Lupuline, per 100 kilogs	640	160	80	160	160	160
165	Bran, from any kind of cereal, per 100 kilogs	·60	·60	65	·60	·60	·60
185	Cement, per 100 kilogs.—						
	Slow setting	1·60	·60	50	·60	·60	·60
	Quick setting	2·40	·40	50	·40	·90	·90
193 bis	Bitumen and asphalt: tiles, per 100 kilogs	4	1	60	4	1·50	1·50
199	Paraffin, per 100 kilogs	696	174	50	696	261	261
205	Cast iron, per 100 kilogs.—						
	Foundry pig	12	3	40	12	4·50	4·50
	Spiegel	16	4	40	16	6·00	6·00

Canadian products enumerated in Schedule B—*Continued*

Number of the French Tariff	Products	French Tariff General	French Tariff Minimum	Percentages	Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States products
		Francs	Francs	p.c.	Francs	Francs	Francs
205 bis	Ferro-manganese, ferro-silicon, etc., per 100 kilogs.—						
	Ferro-silicon less than 5% but more than 20%	88·2	22·05	40	78·28	33·075	33·075
	Containing 20% or more but less than 90%..	100	25	40	88·75	37·50	37·50
	Ferro-molybdenum / Ferro-tungsten	240	60	40	213	90	90
206	Iron, crude, and crude steel in ingots, per 100 kilogs	30·6	7·65	40	21·42	11·47	11·47
207	Iron or steel, rolled or forged in blooms, billets or bars, per 100 kilogs	17	8·50	40	15·725	12·75	12·75
207 bis	Iron or steel rolled or forged in bars of 3 millimetres or less in their thinnest parts, plain or ornate mouldings, or iron in intermittent relief work, per 100 kilogs	33·8	8·45	40	33·8	12·675	12·675
207 ter	Fine steel for tools, per 100 kilogs	156	39	40	156	58·50	58·50
207 quat.	Special steel, per 100 kilogs	138	34·5	40	138	51·75	51·75
207 quin.	Special steel, per 100 kilogs	380	95	40	380	142·5	142·5
208	Iron or steel, machine, per 100 kilogs	78	19·5	40	78	22·50	22·50
209	Hoop iron or steel, hot rolled, per 100 kilogs	62·4	15·6	40	62·4	30	30
209 bis	Cold-rolled, per 100 kilogs.—						
	More than 1 mm	44·8	11·2	40	44·8	16·8	16·8
	$^{6}/_{10}$ m.m. up to 1 m.m	50·4	12·6	40	50·4	18·2	18·2
	$^{4}/_{10}$ m.m. up to $^{6}/_{10}$ m.m	51·6	15·4	40	51·6	22·4	22·4
	Less than $^{4}/_{10}$ m.m	72·8	18·2	40	72·8	26·6	26·6
210	Flat sheet, per 100 kilogs.—						
	More than 1 mm	39·2	9·8	40	9·8	14·70	14·70
	$^{6}/_{10}$ up to 1 mm	50·4	12·6	40	12·6	17·90	17·90
	$^{4}/_{10}$ up to $^{6}/_{10}$ mm	56	14	40	14·0	21·00	21·00
	Less than $^{4}/_{10}$ mm	61·6	15·4	40	15·4	23·10	23·10
	Cut: more than 1 mm	42	10·5	40	10·5	15·75	15·75
	Burnished: more than 1 mm	86·4	21·6	40	21·6	31·2	31·2
	Cold-rolled: more than 1 mm	123·2	30·8	40	30·8	44·0	44·0
210 bis	Flat sheets of nickel steel, per 100 kilogs	224	56	40	224	84	84
210 ter	Bands, hot rolled, per 100 kilogs	36·4	9·1	40	36·4	13·65	13·65
211	Iron, tinned (tin plate), coated with copper, lead, or zinc, per 100 kilogs.—						
	More than $^{6}/_{10}$ mm	144	36	40	144	42	42
	$^{6}/_{10}$ mm. or less	156	39	40	156	45	45
212	Wire of iron or steel, per 100 kilogs.—						
	More than 2 mm. in dia	84	21	40	21	24	24
	More than 1 mm. up to 2	120	30	40	30	33	33
212 bis	Iron shavings, per 100 kilogs	204	51	40	204	60	60
Ex 213	Rails of iron or ordinary steel, per 100 kilogs..	36	9	40	22·50	13·5	13·5
214	Wheels, tires, and wheel centres of iron or steel, per 100 kilogs.—						
	Rough	83·2	20·8	40	52	31·2	31·2
	Worked	104	26	40	65	39	39
	For locomotives—						
	Rough	83·2	20·8	40	52	31·2	31·2
	Worked	124·8	31·2	40	78	46·8	46·8
215	Straight axles for railways and tramways, axles not specially mentioned, of iron or steel, per 100 kilogs.—						
	Rough	176	44	50	176	66	66
	Worked	276	69	50	276	104·5	104·5
216	Crank-axles for locomotives, of iron or steel, per 100 kilogs—						
	Rough	384	96	40	240	144	144
	Worked	640	160	40	400	240	240
217	Axles for automobiles, of iron or steel, per 100 kilogs.—						
	Rough	192	48	40	192	72	72
	Worked	264	66	40	264	99	99

A Few Chemical Products which are important to Canadian Trade

019	Sulphate of ammonia, crude, per 100 kilogs	20	Free	30	20	11·25	11·25
033	Carbide of calcium, per 100 kilogs	96	24	15	24	36	36
0197	Formic aldehyde in solution at 40 p.c., per 100 kilogs	450	112·5	35	450	67·5	67·5
0198	Trioximethylene, per 100 kilogs	1,080	270	35	1,080	162	162
0200	Acetone, per 100 kilogs	200	50	35	200	56·25	56·25
0203	Acetic acid, per 100 kilogs.—						
	Less than 40% acid crystals	80	20	35	80	40	40
	From 40% to 80%	160	40	35	160	80	80
	More than 80%	280	70	35	280	105	105
0210	Acetate or pyrolignite of sodium, crystallized or hydrated, per 100 kilogs	78	19·5	40	78	23·4	23·4

Canadian products enumerated in Schedule B—*Continued*

Number of the French Tariff	Products	French Tariff General	French Tariff Minimum	Percentages	Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States product
		Francs	Francs	p.c.	Francs	Francs	Francs
0211	Acetate of sodium, other, per 100 kilogs	60	15	40	60	15	15
0279	Guaiacol, per 100 kilogs	2,400	600	40	2,400	69	69
300	Black: various, per 100 kilogs.—						
	Ivory black	50	12·5	25	50	18·75	18·75
	Printers' black	41·6	10·4	25	41·6	15·6	15·6
	Spanish, etc	8	3	25	8	4·5	4·5
	Mineral black	12	3	25	12	1·80	1·80
301	Pencils, per 100 kilogs.—						
	Common, of graphite, etc	760	190	60	760	285	285
	Fine, etc	1,680	420	60	1,680	630	630
	Copying pencils	2,160	540	60	2,160	810	810
	Fine, for pocket books, etc	3,600	900	60	3,600	1,350	1,350
302	Carbons, artificial ("agglomeres") and charked ("cuits") for electricity and other industrial uses, per 100 kilogs.—						
	Carbon brushes	360	90	25	360	135	135
	Others	136	34	25	136	51	51
308	Colours ground in oil, per 100 kilogs	96	24	60	96	32	32
311	Perfumery: Soaps, per 100 kilogs.—						
	Others not transparent	115·2	28·8	60	43·2	43·2	43·2
	Transparent with alcohol				with	additional	tax
		960	240	60	240	180	180
	Other	96	24	75	24	36	36
317	Chicory, roasted, etc. per 100 kilogs	57·6	14·4	25	57·6	18	18
319 ter	Dextrine, etc., per 100 kilogs	382·8	95·7	60	382·8	110·2	110·2
321	Candles, per 100 kilogs., other	217·6	54·4	50	217·6	64·6	64·6
322	Wax and stearic acid, manufactured, otherwise than in candles, per 100 kilogs	192	48	25	192	57	57
327 bis	Casein, etc., per 100 kilogs	240	60	75	240	90	90
330	Blacking, creams, etc., per 100 kilogs.—						
	Blacking proper	48	12	75	48	15	15
	Other, etc	600	150	75	600	15	15
347 bis	Articles for electricity, of porcelain, etc., per 100 kilogs.—						
	Insulators: of 90 mm. dia. or less	128	32	50	128	48	48
349 quin.	Glass articles for electric lighting, without fittings of metal, per 100 kilogs	128	32	50	128	48	48
359 bis	Bottles, phials, etc., furnished with mechanical stoppers, per 100 kilogs	84	21	50	84	52·5	52·5
359 ter	Bottles, phials, etc., with emery-ground stoppers, per 100 kilogs	160	40	25	160	60	60
362	Glass articles not otherwise mentioned, per 100 kilogs	384	96	50	384	128	128
367	Glazed yarns, twine, cordage, of hemp, linen, etc., per 100 kilogs, 200 metres or less	320	80	75	320	121·6	121·6
			and other	rates in	proportion	to sizes	
404	Tissues of pure cotton, plain, twilled and drills, per 100 kilogs, 13 kilogrammes and more, 27 threads or less	1,240	310	40	1,240	400	400
			and other	rates in	proportion	to weight,	etc.
418	Blankets of cotton, per 100 kilogs	780	195	25	780	255	255
428 bis	Incandescent mantles, etc., per 100 kilogs	880	220	75	880	330	330
438	Tissues of wool, pure or mixed, per 100 kilogs, stuffs for furniture, etc	1,600	400	40	1,600	496	496
Ex 441 ter	Tissues of pure wool, per 100 kilogs	3,680	920	40	3,680	1,035	1,035
Ex 443	All other articles, etc., per 100 kilogs	5,760	1,440	40	5,760	2,160	2,160
451	Blankets, per 100 kilogs	506	126·5	40	506	200·1	200·1
Ex 454	Cloths, etc., up to 200 gr., per 100 kilogs	1,800	600	40	1,800	633	633
460 sex	Other made up articles	40 per cent	of the 10	% surtax		6%	
461 bis	Wall paper (other than Lincrusta-Walton and the like), per 100 kilogs.—						
	Velveted, etc	360	90	60	360	136·8	136·8
462 bis	Cardboard: moulded, reinforced or not, called papier mache, etc., per 100 kilogs	108	27	60	27	42	42
463	Cardboard: cut, grooved, or shaped, per 100 kilogs.—						
	Rough	192	38	60	38	72	72
	Called fancy	264	66	60	66	99	99
464	Cardboard boxes, etc., per 100 kilogs	432	108	60	108	135	135
464 bis	Cylindrical and conical tubes, so-called "busettes" for spinning and weaving, per 100 kilogs	240	60	50	60	75	75
464 ter	Cardboard wares ("cartonages") ornamented with paintings, etc., per 100 kilogs	1,820	455	50	455	682·5	682·5
464 quat.	Lincrusta and the like, per 100 kilogs	1,820	455	50	1,820	682·5	682·5
465	Articles of cardboard or of cellulose; moulded, compressed, etc., per 100 kilogs	192	48	80	192	72	72
465 bis	Articles of cardboard or of cellulose; lacquered or covered with a uniform varnish, per 100 kilogs	1,100	275	80	1,100	330	330

CANADIAN products enumerated in Schedule B—*Continued*

Number of the French Tariff	Products	French Tariff: General	French Tariff: Minimum	Percentages	Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States products
		Francs	Francs	p.c.	Francs	Francs	Francs
465 ter	The same with painted or inlaid decorations, per 100 kilogs	3,680	920	50	3,680	1,104	1,104
469	Engravings, facsimiles of engravings, etc., per 100 kilogs.—						
	Of one colour, etc., 350 grs. and less, not glazed	672	168	25	672	252	252
	Glazed	1,008	252	25	1,008	378	378
			and other	rates in	proportion	to sizes,	etc.
	In two or more colours, 350 grs. and less, not glazed	1,680	420	25	1,680	630	630
	Glazed	1,890	472·5	25	1,890	708·75	708·75
			and other	rates in	proportion	to sizes	
469 quat	Rolls or bands for cinematographs	20%	20%	50	....	?	?
470	Printed matter of all kinds, etc., per 100 kilogs.						
	Not illustrated	336	84	40	336	126	126
	With illustrations	420	105	40	420	157·5	157·5
476	Skins and hides prepared, per 100 kilogs.—						
	Only tanned or tawed goat, etc	112	28	75	112	28	28
	Other, entire	280	70	75	280	70	70
	Backs and butts	358·4	89·6	75	358·4	89·6	89·6
	Other parts	201·6	50·4	75	201·6	50·4	50·4
	Curried—						
	Calfskins, etc	600	150	75	600	150	150
	Goat, etc	748	187	75	748	187	187
	Cow, etc	580	145	75	70	70	70
	Backs, etc., pig skins	480	120	75	480	225	225
	Sheep skins, etc	648	162	75	648	70	70
	Varnished	2,500	625	75	2,500	625	625
	Chamois, etc	1,008	252	75	1,008	74	74
	Oil-dressed, etc	256	64	75	256	60	60
477 bis	Artificial leather with balata, etc., per 100 kilogs	1,120	280	30	1,120	420	420
478	Straps for clogs, etc., per 100 kilogs	1,480	370	40	370	592	592
479	Uppers for topboots, etc., per 100 kilogs.—						
	Unvarnished	2,400	600	40	175	175	175
	Varnished	3,360	840	40	840	1,272	1,272
480	Top-boots (bottes)—						
	Nailed, etc., per pair	23·2	5·8	40	2·50	2·50	2·50
	Sewn, etc., per pair	34·8	8·7	40	8·7	8·7	8·7
481	Boots or half boots—						
	Woollen, per pair	16	4	40	4	6	6
	Woollen, combined, etc., per pair	24	6	40	6	10	10
	Coloured goat, etc., per pair	32	8	40	8	12	12
482	Low shoes and ankle shoes—						
	Woollen, per pair	8·4	2·1	40	2·1	3·15	3·15
	Woollen, combined fancy, per pair	12·6	3·15	40	3·15	5·25	5·25
	Coloured goat, etc., per pair	16·8	4·2	40	4·2	6·3	6·3
483	Footwear for children, etc., wholly or partly of leather, per pair	8	2	40	8	3	3
	Other	2·40	·6	40	2·4	1	1
484	Gloves, of fur, common, per dozen pairs	118·4	29·6	40	74·	7·4	7·4
	Fine, per dozen pairs	236·8	59·2	40	148	11·1	11·1
			Other	rates on	different	classes.	
485	Articles of fine saddlery (other than saddles), per 100 kilogs	2,880	720	30	2,880	880	880
486	Saddles—						
	For men, each	140	35	40	140	52·5	52·5
	For women, each	168	42	40	168	63	63
487	Harness-wares, per 100 kilogs	1,340	335	40	1,340	402	402
488	Leather transmission belts, etc., alumina tanned, per 100 kilogs	1,222	305·5	40	305·5	470	470
489	Artificial leather transmission belts, etc., per 100 kilogs	1,504	376	40	1,504	564	564
490	Trunks, per 100 kilogs.—						
	Of wood covered with leather	1,204	301	75	301	74	74
	Entirely of leather	1,548	387	75	387	580·5	580·5
491	Wares of morocco leather, per 100 kilogs.—						
	Supple	2,400	600	40	2,400	250	250
	Hard	2,040	510	40	2,040	200	200
491 bis	Covers of albums, per 100 kilogs	2,736	684	40	2,736	220	220
491 ter	Albums for collections, per 100 kilogs	3,040	760	40	3,040	250	250
492	Clothing of all kinds, without fur parts, etc. Other articles not specially mentioned, per 100 kilogs.—						
	Clothing, etc	2,400	600	50	2,400	912	912
	Valises	4,240	1,060	50	4,240	1,590	1,590
	Canes, etc., not varnished	1,080	270	50	1,080	405	405
	Varnished	1,440	360	50	1,440	540	540
	Body belts, etc	1,500	375	50	1,500	5,625	562·5
	Other articles	928	232	50	928	348	348

Canadian products enumerated in Schedule B—*Continued.*

Number of the French Tariff	Products	French Tariff: General	French Tariff: Minimum	Percentages	Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States produc.
		Francs	Francs	p.c.	Francs	Francs	Francs
494	Pelteries: worked or made up, per 100 kilogs.—						
	Common	1,920	480	75	480	720	720
	Other	10400	2,600	75	2,600	650	650
495	Jewellery, goldsmiths' wares, per 100 kilogs.—						
	Of gold and platinum	6,000	6,000	40	6,000	4,000	4,000
	Of silver, etc	4,000	4,000	40	4,000	1,000	1,000
	Goldsmiths' wares of gold and platinum	3,000	3,000	40	3,000	2,000	2,000
	Of silver, etc	2,000	2,000	40	2,000	1,000	1,000
	Jewellery	....	1,550	40			
496	Articles gilt or silvered, per 100 kilogs.—						
	Plated	13500	3,375	40	13500	4,837·5	4,837·5
	Gilt	6.840	1,710	40	6,840	2,561·2	2,561·2
	Nickel plated	2,000	500	40	2,000	750	750
496 bis	Imitation jewellery, etc., per 100 kilogs.—						
	Of aluminium, etc	2,200	550	30	2,200	825	825
	Of copper, etc	1,150	287·5	30	1,150	425·5	425·5
	Of zinc, etc	500	125	30	500	187·5	187·5
504 bis	Table and wall clocks, etc., per 100 kilogs	2,500	625	75	2,500	1,000	1,000
504 ter	Jewel clocks, etc., per 100 kilogs.—						
	From 251 to 500 grammes	2,800	700	75	2,800	1,100	1,100
	250 grammes and less, each	10	2·50	75	10	3·75	3·75
509	Clock and watch fittings, per 100 kilogs	480	....	75	480	200	200
511	Steam engines, portable, etc., per 100 kilogs.	190·4	47·6	30	190·4	71·4	71·4
511 bis	Steam engines, semi-fixed, etc., per 100 kilogs.	217·6	54·4	30	217·6	81·6	81·6
520	Paper-making machines, per 100 kilogs	80	20	50	80	37·5	37·5
521 bis	Machines for folding, etc., per 100 kilogs.—						
	Over 1,000 kilogs	90	22·5	50	90	35	35
	300 to 1,000 kilogs	120	30	50	120	45	45
	Less than 300 kilogs	150	37·5	50	150	57·5	57·5
523	Sewing machines, per 100 kilogs.—						
	Stands, etc	131·2	32·8	50	32·8	41	41
	Machines, proper	574	143·5	50	143·5	205	205
524	Dynamo-electric machines, per 100 kilogs.—						
	1,000 kilogs. and upwards ?	80	....	40	30	30	30
	From 50 kilogs. to 1,000 kilogs ?	120	....	40	45	45	45
	From 10 kilogs. to 50 kilogs ?	320	....	40	120	120	120
	Less than 10 kilogs ?	420	....	40	150	150	150
		Different	rates whe	n containi iron.	ng per cen	tages of	gray cast.
524 bis	Electric and electro-technical apparatus, per 100 kilogs.—						
	Containing coils of insulated wire—						
	1,000 kilogs and upwards ?	120	....	40	....	50	50
	10 kilogs. to 1,000 kilogs ?	250	....	40	....	120	120
	Less than 10 kilogs ?	420	....	40	....	150	150
	1,000 kilogs. and upwards	....	87	40	120	150	150
	From 200 kilogs. to 1,000 kilogs	....	130·5	40	250	120	120
	From 50 kilogs. to 200 kilogs	....	174	40	250	120	120
	From 10 kilogs to 50 kilogs	....	232	40	250	120	120
	From 5 kilogs. to 10 kilogs	....	290	40	420	150	150
	Less than 5 kilogs	....	319	40	420	150	150
	Not containing coils—						
	200 kilogs. and upwards	100	....	40	100	45	45
	From 10 kilogs. to 200 kilogs	175	....	40	175	120	120
	Less than 10 kilogs	320	....	40	320	150	150
	1,000 kilogs. and upwards	....	70	40	100	45	45
	200 kilogs. to 1,000	....	105	40	100	45	45
	50 kilogs. to 200 kilogs	....	140	40	175	120	120
	10 kilogs. to 50 kilogs	....	210	40	175	120	120
	Less than 10 kilogs	....	280	40	320	150	150
525 bis	General machinery, etc., per 100 kilogs	128	32	60	15	15	15
525 sex	Complete apparatus not elsewhere mentioned, per 100 kilogs	128	32	40	128	48	48
526 sex	Heaters, per 100 kilogs	139·2	34·8	40	139·2	52·2	52·2
527 bis	Refrigerating apparatus, per 100 kilogs.—						
	250 kilogs. and upwards	52	....	30	52	30	30
	Less than 250	100	....	30	100	50	50
	500 kilogs. and upwards	....	36	30	52	30	30
	From 250 kilogs. to 500 kilogs	....	42	30	52	30	30
	Less than 250 kilogs	....	75	30	100	50	50
532	Detached parts of machines, etc., per 100 kilogs.—						
	More than 1,000 kilogs	206·4	51·6	40	206·4	18	18
	More than 200 to 1,000 kilogs	258	64·5	40	258	20	20
	200 kilogs. and less	344	86	40	344	25	25
532 ter	Fly wheels for machines, per 100 kilogs.—						
	Rough	96	24	40	96	36	36
	Others	144	36	40	144	54	54
533 bis	Straight axle-trees, etc., per 100 kilogs	234	58·5	25	23·4	89·7	89·7

Canadian products enumerated in Schedule B—*Continued.*

Number of the French Tariff	Products	French Tariff General	French Tariff Minimum	Percentages	Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States products
		Francs	Francs	p.c.	Francs	Francs	Francs
533 ter	Straight shafts, solid, per 100 kilogs.—						
	Morethan 1,000 kilogs.—						
	Rough	275·2	68·8	25	275·2	103·2	103·2
	Worked	344	86	25	344	129	129
	From 100 to 1,000 kilogs.—						
	Rough	298·8	74·7	25	298·8	112·05	112·05
	Worked	398·4	99·6	25	398·4	149·4	149·4
	From 10 kilogs to 100 kilogs.—						
	Rough	332	83	25	332	124·5	124·5
	Worked	531·2	132·8	25	531·2	199·2	199·2
	Less than 10 kilogs.—						
	Rough	498	124·5	25	498	190·9	190·9
	Worked	664	166	25	664	249	249
533 quat	Straight shafts, bored, etc., per 100 kilogs.—						
	More than 1,000 kilogs.—						
	Rough	200	50	25	200	75	75
	Worked	300	75	25	300	115	115
	From 100 to 1,000 kilogs.—						
	Rough	240	60	25	240	90	90
	Worked	360	90	25	360	135	135
	From 10 to 100 kilogs.—						
	Rough	300	75	25	300	115	115
	Worked	400	100	25	400	150	150
	Less than 10 kilogs.—						
	Rough	400	100	25	400	150	150
	Worked	600	150	25	600	225	225
533 sex	Component parts of boilers, per 100 kilogs.—						
	Rough	187·2	46·8	25	187·2	72	72
	Worked	259·2	64·8	25	259·2	97·2	97·2
533 sept	Balls for ball bearings	70%	35%	75	?	?	
533 oct	Rough frames and bodies of dynamos, per 100 kilogs.—						
	More than 1,000 kilogs	160	40	25	160	60	60
	300 to 100 kilogs	170	425	25	170	63·75	63·75
	100 to 300 kilogs	180	45	25	180	67·50	67·50
	15 to 100 kilogs	190	475	25	190	71·25	71·25
	3 to 15 kilogs	200	50	25	200	75	75
	1 to 3 kilogs	300	75	25	300	112·5	112·5
	Less than 1 kilog	400	100	25	400	150	150
534	Springs of steel for carriages, etc., per 100 kilogs.—						
	Polished	480	120	75	480	180	180
	Not polished	230·4	57·6	75	57·6	86·4	86·4
525 ter	Wires and cables, insulated, etc., per 100 kilogs.						
	Silk in combination with rubber, etc	1,920	480	50	1,920	720	720
	Rubber alone, etc	1,344	336	50	1,344	504	504
	Other $^{8}/_{10}$ mm. or greater	768	192	50	768	432	432
	Less than $^{8}/_{10}$ mm	1,152	288	50	1,152	720	720
536 bis	Electric arc-lamps, etc., per 100 kilogs	960	240	50	240	450	450
541	Wire gauze of iron or steel, per 100 kilogs.—						
	Exceeding 2 mm. in dia	160	40	60	40	60	60
	1 mm. to 2 mm	220	55	60	55	80	80
	$^{5}/_{10}$ mm. to 1 mm	260	65	60	65	100	100
	Less than $^{5}/_{10}$ mm	420	105	60	105	150	150
542	Wire gauze of copper or brass, per 100 kilogs.—						
	Ordinary	312	78	60	78	117	117
	More than 500 gr. per sq. metre	624	156	60	156	234	234
	500 grammes or less	1,560	390	60	390	585	585
543	Wire netting of iron or steel, per 100 kilogs.—						
	More than 5 mm	132	33	50	132	49·5	49·5
	More than 2 mm. and up to 5 mm	158·4	39·6	50	158·4	59·4	59·4
	More than 1 mm. and up to 2 mm	198	49·5	50	198	59·4	59·4
	1 mm. and less	237–6	59·4	50	237·6	59·4	59·4
Ex 549	Cutlery, fine and blades of razors, per 100 kilogs.—						
	Blades of razors finished, other	2,688	672	40	2,688	600	600
552	Railway chairs, etc., per 100 kilogs	75	18·75	40	18·75	25	25
554	Iron castings for machinery or for ornament, per 100 kilogs.—						
	More than 50 kilogs	80	20	30	20	30	30
	From 5 to 50 kilogs	100	25	30	25	35	35
	Less than 5 kilogs	120	30	30	30	40	40
555	Other than parts of machines, etc., per 100 kilogs	224	56	60	224	84	84
555 bis	Ribbed cylinders and cylinders with water jackets, pistons, etc., per 100 kilogs.—						
	More than 60 kilogs	140	35	40	140	52·5	52·5
	From 12 to 60 kilogs	180	45	40	180	67·5	67·5
	Less than 12 kilogs	220	55	40	220	82·5	82·5

Canadian products enumerated in Schedule B—*Continued.*

Number of the French Tariff	Products	French Tariff General	French Tariff Minimum	Percentages	Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States products.
		Francs	Francs	p.c.	Francs	Francs	Francs
557	Stoves, fire-places, heaters, etc., per 100 kilogs.						
	Entirely of cast iron, etc	124·8	31·2	40	124·8	46·8	46·8
	Of cast iron and sheet iron, etc	187·2	46·8	40	187·2	72·8	72·8
	Of cast iron polished, etc	249·6	62·4	40	249·6	93·6	93·6
	Of cast iron covered with impressions, etc.	395·2	98·8	40	395·2	150·8	150·8
557 bis	Manufactures of cast iron: pots and other articles, etc., per 100 kilogs	88	22	40	88	33	33
559 ter	Hinge-plates, etc., per 100 kilogs	336	84	40	336	147	147
559 quat	Keys, iron lock bolts of all kinds, etc., per 100 kilogs.—						
	Of iron, etc	366	91·5	40	366	140·3	140·3
	Of copper, etc	400	100	40	400	125	125
561	Cables of iron and steel, per 100 kilogs.—						
	Of wire, more than 2 mm	151·2	37·8	40	151·2	58·8	58·8
	Of wire, more than 1 mm. up to 2 mm	201·6	50·4	40	201·6	75·6	75·6
	Of wire, 5/10 mm. up to 1 mm	235·2	58·8	40	235·2	88·2	88·2
			Other	rates on	different	classes.	
561 bis	Barbed fencing wire, per 100 kilogs	184·8	46·2	30	184·8	69·3	69·3
562	Anchors, per 100 kilogs	134·4	33·6	40	134·4	50·4	50·4
562 bis	Chains of iron or steel, per 100 kilogs.—						
	15 mm. or more	134·4	33·6	30	134·4	50·4	50·4
	More than 8 mm. and less than 15 mm	201·6	50·4	30	201·6	75·6	75·6
	8 mm. and less	252	63	30	252	100·8	100·8
563	Nails: for shoeing animals, etc., per 100 kilogs.	384	96	40	384	147·2	147·2
	Ice clamps, etc	563·2	140·8	40	563·2	211·2	211·2
564	Other kinds of nails, per 100 kilogs.—						
	Large, etc	84	21	40	84	31·5	31·5
	Medium	126	31·5	40	126	45·5	45·5
	Small	196	49	40	196	66·5	66·5
	Very small	420	105	40	420	140	140
565	Nails of wire, etc., per 100 kilogs.—						
	More than 2 mm	105·6	26·4	30	26·4	49·5	49·5
	More than 1 mm	145·2	36·3	30	36·3	66	66
	1 mm. and less	316·8	79·2	30	79·2	115·5	115·5
566	Screws, eyebolts, strap hinges, etc., per 100 kilogs.—						
	25 mm. or more	280	70	40	280	105	105
	18 mm. to 25	336	84	40	336	126	126
	12 mm. to 18 mm	392	98	40	392	147	147
	8 mm. to 12 mm	476	119	40	476	189	189
	3 mm. to 8 mm	616	154	40	616	252	252
	Less than 3 mm	784	196	40	784	294	294
	Wood screws of of iron or steel one-half of above rates.						
566 bis	Same articles, turned or "decolletes," per 100 kilogs.—						
	25 mm. or more	336	84	30	336	126	126
	From 18 mm. to 25 mm	504	126	30	504	189	189
	From 12 mm. to 18 mm	560	140	30	560	210	210
	From 8 mm. to 12 mm	616	154	30	616	231	231
	From 3 m.. to 8 mm	840	210	30	840	315	315
	Less than 3 mm	1,064	266	30	1,064	399	399
566 ter	Split washers, per 100 kilogs.—						
	Less than 5 grammes	560	140	40	560	210	210
	From 5 gr. to 25 gr	476	119	40	476	175	175
	More than 25 gr	392	98	40	392	147	147
567	Tubes of iron or steel, per 100 kilogs.—						
	Simply butt-joined—						
	9 mm. and more	126	31·5	30	107·1	47·25	47·25
	Less than 9 mm	198	49	30	166·6	73·5	73·5
	Butt-welded—						
	More than 35 mm. up to 100 mm	140	35·5	30	119·1	52·5	52·5
	35 mm. and less	252	63	30	214·2	94·5	94·5
	Of any diameter	252	63	30	214·2	24	24
	Worms and jointings	252	63	30	214·2	94·5	94·5
567 bis	Tubes and worms, pressed, etc., per 100 kilogs.						
	Over 35 mm	336	84	30	336	126	126
	9 mm. to 35 mm	480	120	30	480	180	180
	5 mm. to 9 mm	1,760	440	30	1,760	660	660
	2 mm. to 5 mm	3,960	990	30	3,960	1,485	1,485
	2 mm. and less	35200	8,800	30	35,200	13,200	13,200
571	Buckles for saddlery, etc., per 100 kilogs	304	76	30	304	133	133
572 bis	Tools of copper, etc., per 100 kilogs	348	87	40	348	35	35
575	Other wares not otherwise mentioned, per 100 kilogs	480	120	40	480	150	150
	Brass screws	288	72	40	288	90	90
576	Lead pipes and manufactured lead, etc., per 100 kilogs.—						
	50 grammes and more	78	19·5	40	19·5	30	30
	Less than 50 grammes	108	27	40	27	40·5	40·5
	20 grammes and less	168	42	40	42	63	63
	Manufactures, etc	216	54	40	54	81	81

Canadian products enumerated in Schedule B—*Continued.*

Number of the French Tariff	Products	French Tariff General	French Tariff Minimum	Percentages	Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States products
		Francs	Francs	p.c.	Francs	Francs	Francs
576 ter	Electric accumulators and component parts, per 100 kilogs.—	303·6	75·9	30	303·6	115	115
576 quat	Dry cells, per 100 kilogs	560	140	60	560	210	210
577	Tin pots and other manufactures of tin, per 100 kilogs.—						
	80 grammes and more	360	90	30	360	135	135
	Less than 80 grammes	480	120	30	480	180	180
579	Articles of nickel, etc., per 100 kilogs	1,200	300	60	300	450	450
579 bis	Manufactures of aluminium, etc., per 100 kilogs.						
	Other than jewellery	1,440	360	30	1,440	540	540
	Other	480	120	30	480	180	180
590	Furniture, of bent wood, put together or not, pieces and parts of furniture of bent wood, per 100 kilogs.—						
	Painted	170	42·5	40	106·25	64·6	64·6
	Other	102	25·5	40	63·75	30·6	30·6
590 bis	Bottoms for chairs or for backs, per 100 kilogs.						
	Varnished	252	63	40	252	98	98
	Other	168	42	40	168	63	63
591	Furniture other than bent wood, per 100 kilogs.						
	Carved sofas, etc	600	150	40	375	226	226
	Carved others	1,000	250	40	625	375	375
	Carved uniform	400	100	40	250	150	150
	Waxed or varnished	320	80	40	200	120	120
	Other chairs	240	60	40	150	90	90
591 bis	Pieces and separate parts of chairs, turned pieces, per 100 kilogs.—						
	Varnished	136	34	40	34	30	30
	Other	102	25·5	40	25·5	25	25
595	Casks empty, serviceable, fitted together or not, per 100 kilogs.—						
	500 litres or more	120	30	50	120	48	48
	Less than 500 litres	48	12	50	48	18	18
597	Builders "and cartwrights" wood, shaped, per 100 kilogs.—						
	Hardwood	31	7·75	50	7·75	10·85	10·85
	Soft wood	24·8	6·2	50	6·2	9·3	9·3
602 bis	Manufactured of turned wood, etc., per 100 kilogs.—						
	Varnished	136	34	40	34	30	30
	Other	102	25·5	40	25·5	25	25
602 ter	Vats and tubs, put together or not, per 100 kilogs	180	45	25	180	60	60
602 quat	Felloes of wood, per 100 kilogs	330	82·5	30	330	125·4	125·4
603	Wood, squared, for shuttles, under 500 grammes in weight, per 100 kilogs	2·60	·65	40	·65	·65	·65
603 bis	Shuttles for weaving, per 100 kilogs	432	108	60	108	180	180
603 ter	Handles for agricultural instruments, etc., per 100 kilogs.—						
	Of ash, other	72	72	50	72	12·5	12·5
	Other varnished	200	50	50	200	15	15
	Other	54	13·5	50	54	12·5	12·5
603 quat	Other manufactures of wood, per 100 kilogs	75	18·75	50	18·75	22·5	22·5
Ex 604	Pianos, grand ?	70%	35%	40	52·5	per 100 85 fcs.	kilogs. 85 fcs.
	Organs, 200 kilogs. but less than 300 ?	70%	35%	40	52·5	260	260
	Phonographs ?	50%	25%	40	50%	90 fcs.	90 fcs.
	Cylinders, etc., marked	50%	25%	40	50%	68 "	68 "
	Cylinders, copper, per 100 kilogs Fcs.	416	104	40	416	156	156
	Cylinders, nickelled "	1,560	390	40	1,560	715	715
	Cylinders, silvered gilt "	3,120	780	40	3,120	1,170	1,170
Ex 605	Accessories and detached pieces of musical instruments (for instruments enumerated in Article Ex 604)	Practically the same as Ex 604					
Ex 614	Carriages, etc., per 100 kilogs.—						
	Weighing 125 kilogs and more	700	175	60	175	60	60
	Weighing less than 125 kilogs	1,880	470	60	470	150	150
	Vehicles for trade, on springs	288	72	60	72	15	15
	Not on springs	144	36	60	36	8	8
	Other carriages at different rates.						
614 bis	Cycles and parts thereof, per 100 kilogs	1,672	418	40	1,672	250	250
	Rims, etc	380	95	40	380	142·5	142·5
	Other	760	190	40	760	285	285
615	Vessels in a fit state for use, hulls of seagoing ships of wood, river boats of all sizes, per ton.						
	Wood, per ton	24	6	40	6	16·80	24
	Iron, per ton	25·5	25·5	40	25·50	25·50	25·5
616	Vessels in a fit state for use, hulls of seagoing ships of wood, river boats of all sizes, per ton.	23	5·75	40	23	16·1	23
617	Vessels in a fit state for use, hulls of seagoing ships of wood, river boats of all sizes, per ton.						
	Wood, per ton	12	10	40	10	11·2	12
	Of iron or steel, per ton	50	40	40	50	46	50

Canadian products enumerated in Schedule B—*Concluded.*

Number of the French Tariff	Products	French Tariff		Percentages	Present rates on Canadian products	Rates on Canadian products under the new agreement	Rates on United States productts
		General	Minimum				
		Francs	Francs	p.c.	Francs	Francs	Francs
618 ter	Motor boats with electric or explosion motor.—						
	Of wood, per ton	160	40	30	160	60·8	60·8
	Of iron or steel, per ton	320	80	30	320	120	120
Ex 620	Manufactures of india-rubber and gutta-percha with the exception of sheets of india-rubber and threads of vulcanized india-rubber (paragraphs 1 and 2) Elastic tissues, per 100 kilogs.—						
	Threads of imitation gold	1,600	400	40	400	600	600
	Of silk, less than 20 mm. and greater than 45 mm	1,600	400	40	400	600	600
	Other widths	3,200	800	40	800	1,200	1,200
	Rubbered tissues, etc., 800 grammes or more	924	231	40	231	346·5	346·5
	More than 400 grammes	1,782	445·5	40	445·5	660	660
	400 or less: Less than 44 threads	2,640	660	40	660	990	990
	44 threads or more	5,280	1,320	40	1,320	1,980	1,980
	Made up articles weighing 400 grammes or less per sq. metre	3,600	900	40	900	1,350	1,350
	Dress preservers—						
	Of sheet rubber, etc	720	180	40	180	270	270
	Of rubber tissue not silk	1,800	450	40	450	684	684
	Of rubber tissue with silk	2,448	612	40	612	918	918
	Braces, etc., not silk	1,800	450	40	450	675	675
	Braces, etc., silk	3,600	900	40	900	1,350	1,350
	Braces, other	3,000	750	40	750	900	900
	Special tissues for cases—						
	Without felt	728	182	40	182	273	273
	Lined with felt	811·2	202·8	40	202·8	312	312
	Boots and shoes with felt, etc	4,040	260	40	260	390	390
	Lined with cotton, etc	832	208	40	208	312	312
	With rubber soles, per pair	5·2	1·3	40	1·3	1·95	1·95
	Inner tubes or pneumatic tires, per 100 kilogs	600	150	40	150	225	225
	Blocks, solid tires, per 100 kilogs	416	104	40	104	130	130
	Belting, etc., per 100 kilogs	1,120	280	40	280	90	90
621	Felt for sheathing and for soles, per 100 kilogs.	380	95	40	380	121·6	121·6
622	Felt for printed carpets, per 100 kilogs	608	152	40	608	190	190
623	Felt and felted cloths for machines, etc., per 100 kilogs	4,500	1,125	40	4,500	1,350	1,350
623 bis	Felted tissues for paper making, under tissues according to kind	....	....	40			
624	Felt for articles of clothing, etc., per 100 kilogs. Under tissues according to kind	....	....	40			
625	Felt, all other, per 100 kilogs.—						
	Of coarse hair	400	100	60	400	128	128
	Of wool, etc	1,120	280	60	1,120	720	720
630 quat	Articles for use in acetylene lighting, etc.—						
	Burners, each	·60	15	30	·60	·225	·225
	Burners, metallic each	·60	15	30	·60	·225	·225
	Candles, etc	1·20	30	30	1·20	·45	·45
634 bis	Surveying instruments, levelling instruments, plan drawing instruments, water levels, simple spirit levels, per 100 kilogs.—						
	Spirit levels	816	204	50	816	360	360
634 quat	Instruments and apparatus for demonstration and instruction, per 100 kilogs	3,600	900	30	3,600	1,350	1,350
635 bis	Photographic apparatus, etc., per 100 kilogs.	3,200	800	50	3,200	1,200	1,200
	Cinematographs, etc., per 100 kilogs	640	160	50	640	240	240
Ex 636	Penholders and component parts—						
	Fountain pens, or stylographs, with or without nib or point, each	8	2	50	8	3	3
644 bis	Paint and other brushes, per 100 kilogs.—						
	Of martin's hair	1,520	380	40	1,520	570	570
	Of pigs' bristles, common	912	228	40	912	342	342
	Fine wooden, etc	1,520	380	40	1,520	570	570
	Feather dusters	912	228	40	912	342	342
	For clothes, etc., without mounting	456	114	40	456	171	171
	With plush, etc	1,520	380	40	1,520	570	570
	Cuttings of chamois, etc	456	114	40	456	171	171
	Of hair, etc	912	228	40	912	342	342
	Boot and shoe brushes of vegetable material material	456	114	40	456	171	171
	of hair, etc	912	228	40	912	342	342
	of mixed materials	684	171	40	684	266	266
647 bis	Corsets—						
	Of cotton, each	10	2·50	40	10	3·75	3·75
	Of cotton, trimmed	12	3	40	12	4·50	4·50
	Of silk	24	6	40	24	9·00	9·00

Changes after 15th November, 1922, are not taken into account in this statement.

THE MARKET FOR RUBBER GOODS IN BELGIUM

Trade Commissioner A. S. Bleakney

Brussels, February 15, 1923.—At the present time there is not a great deal of Canadian rubber goods being sold in Belgium. The representative of the United States Rubber System handles a few lines from the Canadian factories, and it is proposed to handle Canadian-made tennis shoes of the "Fleetfoot" line exclusively next season. Rubber overshoes made in Canada are seen occasionally on the shelves of retail shops in Belgium. One make of Canadian tire is also being sold here.

Canadian spiral packing has been highly appreciated in Belgium and is used exclusively by one Belgian automobile manufacturer.

In view of the beginnings already accomplished, a review of the market is given below. It is hoped by this means to enable Canadian firms to estimate their ability to do business here.

TRADE RETURNS

There is little information to be gained from this source. The figures, however, are given, as they do show the allotment of the requirements to different countries:—

Belgian Imports of Rubber Goods for First Nine Months of 1922

	Weight Kilos.	Value Francs
Germany	103,237	1,349,382
United States	26,450	443,833
France	351,928	5,038,715
Great Britain	371,263	5,356,126
Italy	14,616	169,793
Holland	9,709	95,439

Belgian Imports of Automobile Tires for First Nine Months of 1922

Canada (May to Sept.)	6,620	91,884
Germany	33,446	219,314
United States	66,733	1,167,243
France	535,510	9,859,331
Great Britain	420,908	2,820,517
Holland	12,155	221,365

The United States statistics of exports of india-rubber and manufactures to Belgium for 1920 show that tires constituted the principal item of export. These included casings ($1,139,526), inner tubes ($96,792), and solid tires ($42,991). Shoes were exported to the value of $76,599; scrap, $14,801; hose, $9,689; packing, $6,921; and reclaimed rubber, $5,854.

RUBBER TIRES

This is the most important branch of the import rubber trade. Amongst the well-known non-Belgian firms operating are the Michelin, Goodyear, Pirelli, Goodrich (who have a French factory), Miller and Dunlop. Belgian firms of importance are Englebert at Liège and Janatzy at Malines.

Michelin does about 65 per cent of the automobile tire business, Englebert about 20 per cent, and the rest is chiefly divided between Goodyear, Goodrich, Miller, and the United States Rubber Co. The registration of automobiles is

42,000, trucks 12,000, motor cycles 7,500, and bicycles 800,000. The bicycle tire business is done principally by Englebert, Dunlop, Bates and Mosley. One Canadian tire firm are represented in Belgium, through the efforts of this office, and the agent recently interviewed advises that business is being transacted, although not yet in large quantities. The latest price lists of the firms mentioned are on file in the Department of Trade and Commerce, Ottawa, together with the discount allowed by an important firm.

Tires at present come under item 70 of the customs tariff (detached parts of automobiles) and the rate is 12 per cent plus 1 per cent sales tax. The last freight furnished from Montreal to Antwerp was 30 cents per cubic foot.

MECHANICAL RUBBER GOODS

Amongst mechanical goods in demand here, belting is relatively important. There are about 6,000 factories in Belgium; many of them are extremely small. Two well-known American kinds, Rainbow and Pilot, are suitable for the market. American shipments of belting in 1920 were valued at only $5,000.

In this class of goods, hose is of most importance. The Americans are selling air hose (U.S. Rubber Co. No. 4810), Mogul brand water hose, Beggen water hose, beer hose, and two kinds of gasolene hose. The duty on all hose is 10 per cent.

WATER HOSE

Light hose for watering purposes sells well in Belgium. A full range of samples of various Belgian, English, and German hose on the market is on file at the Department of Trade and Commerce, Ottawa, together with retail prices. Factory prices on these samples are 10 to 15 per cent lower.

The local type of garden hose consists of a simple rubber tube with 1- to 4-ply of duck in sizes of $\frac{3}{8}$-inch to 2-inch interior and walls of $2\frac{1}{2}$, $3\frac{1}{2}$, 5 and 6 millimetre. A 1-inch interior 3-ply with 5 mm. wall is sold at a factory price of 5.84 francs the metre. Figure 1 shows a specially strong type at proportionately higher prices. Figure 2 shows a type of water hose for pumping liquids, wound with metal spiral.

The current grade of one Belgian company in this type of hose in blue rubber, 1-inch interior diameter, 3-ply textile and a wall thickness of $5\frac{1}{2}$ mm., without spiral, sells at a factory price of 8.84 francs the metre. This hose is made in sizes of $\frac{3}{8}$-inch up to 6-inch, with 1, 2, 3, 4 or 5 plies and wall thicknesses of 3, 4, $5\frac{1}{2}$, 7 and $8\frac{1}{2}$ mm. A heavier type of hose is also produced from $\frac{3}{8}$-inch to 2-inch with 1- to 4-ply textile, interior blue and exterior white, at proportionately higher prices. A 4-mm. spiral of metal costs about 1 franc a metre extra on the 1-inch (interior) hose.

BREWERS' HOSE

There are approximately 1,500 breweries in Belgium equipped with motive power, and there is a corresponding call for beer hose. This demand is catered to by the local manufacturers; Figures 3 and 4 show the Belgian type of hose offered. The sizes generally manufactured are $\frac{3}{4}$-inch inside measurement to $2\frac{1}{4}$-inch, and the wall thicknesses from 5 to 11 mm. Figure 3 is an average quality for a 1-inch (inside) hose, 5-mm. (or $\frac{3}{16}$-inch) thick, and sells from the factory for 11.20 francs the metre. The lowest of two grades of a Para hose, in the same size, sells for 13.70 francs the metre. The spiral hose (without metal) shown in Figure 4 usually comes 10 per cent higher. It will be noted that the hose shown are 3- and 4-ply hose, whereas Canadian beer hose sometimes runs as high as 12-ply.

SUCTION HOSE

Figures 5 and 6 show the usual types of suction hose in use. One firm specializes in suction hose as shown in Figure 5 with projecting spiral and with heavy duck covering. Figure 6 is furnished on demand. The usual sizes furnished are $\frac{3}{8}$-inch to 6-inch, and the plies are in proportion to the size and wall thickness, which runs from 5 mm. to 11 mm. A 2-inch size (inside) with $\frac{3}{16}$-inch wall sells at 17.20 francs the metre.

STEAM HOSE

In an industrial country like Belgium there is naturally a large demand for steam hose. Figure 7 shows Belgian steam hose covered with a flexible coating of braided steel wires. This covering is charged for at 25 per cent

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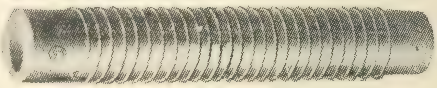

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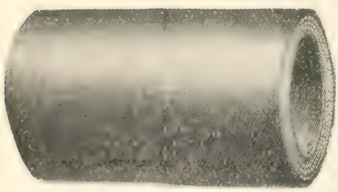

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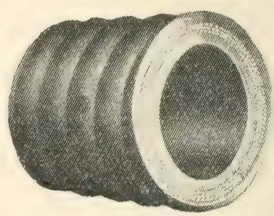

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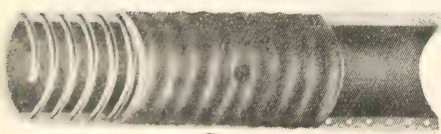

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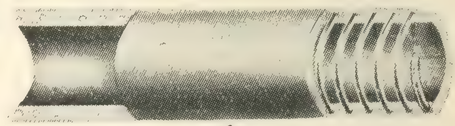

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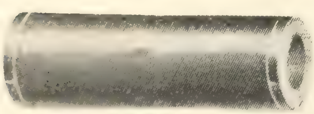

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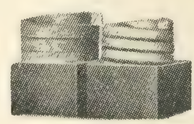

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over the cost of hose not so protected. The most popular sizes are from $\frac{1}{2}$-inch to 2-inch inside diameter, varying by about $\frac{1}{8}$-inch sizes. Wall thicknesses vary from $\frac{3}{16}$-inch to $\frac{3}{8}$-inch. In the current quality the 5-mm. or $\frac{3}{16}$-inch wall, 1-inch internal diameter, 4-ply, resists three to four atmospheres. This hose sells for 13.85 francs the metre (factory price). For very high temperatures, asbestos textile is used.

FIRE HOSE

There is of course the usual demand in Belgium for fire hose. One English firm, with factory in Manchester, advertises having furnished 100,000 metres since the Armistice. Their qualities are linen and jute, rubberized or not. The specifications of the Brussels Fire Department are on file at the Department

of Trade and Commerce and can be had on request by referring to file No. 27000. They call for hose of linen rubberized, in 20-metre lengths, 45-mm. ($1\frac{3}{4}$-inch) internal diameter, also linen hose rubberized of 65-mm. ($2\frac{1}{2}$-inch) inside diameter. The linen is required to be of first quality without colouring. The hose must have two coats of rubber on the inside, one grey coat well combined with the textile, and the other, the inside coat, in red rubber. These coats must be of uniform thickness and must be satisfactory as to adherence. The grey coating should analyze $57\frac{1}{2}$ per cent pure gum and the red coat 85 per cent pure gum. This hose must be capable of resisting an inside pressure of fifteen atmospheres. An ordinary tender is for 1,500 to 2,000 metres of hose of $1\frac{3}{4}$-inch and 1,000 to 1,200 metres of $2\frac{1}{2}$-inch hose. Payment is five-sixths of the amount on delivery and one-sixth after one year's use. Tenders must be made through a resident in Brussels. Sample is deposited in Brussels and is not allowed to be taken off the premises at the fire station. Each commune in Belgium has its own specifications, but they follow the general lines of the above.

PACKING

Mention has been made of the sale of Canadian spiral packing manufactured by the United States Rubber System. This is indicative of the vulnerability of the market (see Figure 8). Belgian factory prices on sheet packing of 3- to 5-mm. thickness with 1- to 2-ply of duck are 3.60 francs the kilo. The 3-mm. size with 2-ply of duck costs 4.15 francs the kilo. A red quality sells at 3 francs and 3.25 francs for the 3-mm. 2-ply type.

Dry asbestos packing of the current quality sells at 13.75 francs the kilo.; tallowed is cheaper at 9.25. Dry jute costs 5 francs, tallowed 4.75, while dry and tallowed cotton packing sell for 15 and 13 francs respectively.

The stores give considerable prominence to red rubber gasket tubing.

MOULDED GOODS

The variety of moulded goods being practically unlimited, mention will be made of a number of articles in demand with current wholesale prices for the average quality.

Gas tubes in the usual sizes vary from 10 francs the kilo. to 15 francs according to quality. Rubber matting or flooring varies from 6.50 francs to 8·50 francs the kilo. Band-saw bands are 16·50 francs the kilo. Tires for wheelbarrow wheels 17.50 francs the kilo; for other wheels, 20 to 25 francs, according to work involved. Cones for breweries vary from 0.35 franc each to 0.60 franc, according to models; valves for breweries, 0.15 franc to 0.20 franc each; lavatory cones, 0.60 franc to 1.50 francs. Basin and bath plugs, soft, sell at 0.15, 0.25, 0.45 and 0.80 franc according to size; hardened proportionately dear. Bumpers for W.C.'s, 0.08 to 0.15 franc according to size. Buttons for same, 0.14 to 0.16 franc.

Steps have been taken to secure samples of the above goods.

DRUGGISTS' SUNDRIES

This is an important line in Belgium, catered for largely by United Kingdom and United States manufacturers. Hot-water bottles, combination water bottles and fountain syringes occupy a prominent place in local window displays and average about 25 francs in price. Amongst goods of this kind the marks of the North British Rubber Company, Goodyear Glove Company, U.S. Rubber Co., and Millers are much in evidence. The Goodyear bottle retails for 17 francs for the usual size used in Canada. Another article featured by the

shops is the well-known whirling spray syringe, also pear-shaped vaginal douches in red rubber and hard rubber pipe. These vary in price from 10 to 20 francs. Ear syringes from about 1-inch to 3-inch bulb are also good sellers. Figure 39 in the Consolidated Rubber Company's catalogue shows the type in demand. Another important item of trade is the bulb syringe. An English make with egg-size bulb sells at 9.50 francs; better qualities sell at higher prices; these are usually in glossy finish with smooth bulb. Rubber sponges appear to have taken the popular fancy. An average quality in red rubber, say, 1½-inch by 3-inch by 5-inch, retails for 3 francs. Invalid cushions should be mentioned, these being in good demand, and most windows show hospital or nursery sheetings, surgeons' bandages, etc. Other less important articles are water-wings (Miller's), 6.50 francs; round collapsible tobacco pouches (German), 1.50 francs; kitchen gloves, 6.95 francs; children's rubber pants, 9.75 francs.

This summary would not be complete without referring to the demand for bladders for Association football. These are stocked by all rubber shops and sporting stores.

BOOTS AND SHOES

There is a growing demand for rubber overshoes in Belgium, but it should be realized that there is no general use of rubbers in this country although, on account of the extremely wet and dirty streets in winter, the conditions for their sale obtain to a greater degree than in Canada. As soon as rain starts here, the mud commences to ooze up through the flag-stone paving until the streets become coated with a muddy slime. In spite of this, the rubber overshoe is not popular as it is not thought to be stylish. It is extraordinary how most women go about on muddy streets with the thinnest of low-cut, high-heeled shoes, innocent of even a half rubber overshoe or foothold. It is believed that this trade could be built up through advertising and educating the public to the dangers of wet feet. At present the market for rubber soles and heels is being successfully cultivated.

British, French, and American rubber overshoes are on sale in rubber and boot shops, and a few Canadian shoes have been noticed. It should also be mentioned that there is a considerable market for hip boots for seamen's use at the ports of Antwerp, Brugès, Ghent, and Ostend. Samples of a purely Canadian boot were noted in the warehouse of one imported.

There is also a decided market for the Canadian type of running or tennis shoe. The courts here are of the brick dust type, as in the United Kingdom, and the colour required is mostly white. At present the market is largely stocked, but is worth investigation for future exploitation.

MARKET FOR WOODENWARE IN SCOTLAND

TRADE COMMISSIONER GORDON B. JOHNSON

Glasgow, February 27, 1923.—An investigation of the market for woodenware in this country, with special reference to Canadian exports, can hardly fail to reveal two outstanding points, namely, the general excellence of woodenware of Canadian manufacture and the high reputation it enjoys, and the difficulty it has at present in meeting competition in price.

A broad fact which emerges, and which is evident in other lines of industry as well, is that since the war price and quality have changed places in importance in the eye of the British consumer. Before the war quality was the more important factor—an article had to be of the best to find general favour, and the price paid for it was of less consequence. To-day the reverse is the case,

and in the matter of woodenware, very inferior broom handles, clothes pegs, etc., from Germany, Sweden, and other Continental countries at low prices appear to have the bulk of the trade. Nevertheless quality is and will remain a very important factor, and if there is not too great a spread in prices between the Canadian product of high quality and the inferior Continental article, a good business should go to Canadian manufacturers if they go after, and persistently follow up, the openings which present themselves through trade inquiries in the *Commercial Intelligence Journal,* and through keeping in constant touch with the importers in good standing whose names are available at the Department of Trade and Commerce at Ottawa, or at this office.

The question arises as to the advisability of Canadian woodenware manufacturers doing a business in this country exclusively through agents. The objection to this arrangement from the manufacturer's point of view is that his possibly fine margin of profit might be wiped out by, or the market might not support, an agent's commission. One important buyer in Glasgow says that a good agent, strongly supported by a good Canadian manufacturer, should do well for his principals. He instances the case of a United States concern with a London agent who books orders for carloads of clothes pegs to be passed to his firm, but who can deliver smaller quantities from a small local warehouse. On the other hand, another buyer of importance states that a Canadian firm maintaining an agent *and a warehouse* on this side would be able to do good business with the smaller buyers, but the buyers in car lots and over would be lost, as they prefer to do business direct. The big buyers, however, would have no objection to an agent carrying no stock. A huge firm in Glasgow with many branches throughout the country, with a capital of over £4,000,000, with many ramifications and handling a great variety of products, state that they buy most of their clothes pegs and other woodenware through a London agent of a Swedish concern, who no doubt is a persistent caller. This seems to show the advisability of an agency arrangement for Canadian firms, but on the other hand this Glasgow concern, notwithstanding its size, does not buy clothes pegs in larger quantities than one carload.

The conclusion to be drawn is that the question of an agency arrangement is one that cannot be airily dismissed one way or the other; that the pros and cons need to be carefully considered by those Canadian firms determined to secure and *maintain* a profitable business here; that the business should be built on a solid foundation of carefully ascertained facts and knowledge; and that snatching at profits from time to time, and neglect of the market at other times, not only cannot build up a satisfactory business for an individual company but retards development and injures the reputation of the whole Canadian industry, and Canadian trade in general.

CLOTHES PEGS

Spring pegs coming to this country are mainly German, at a price from 1s. 1d. to 1s. 3d. per gross. For the round 4½-inch peg, which is now coming mainly from Germany and the United States, it hardly seems possible for Canadian firms to meet the present German price of about 3s. 9d. per 5-gross box c.i.f. The German peg is an inferior article, by no means in the same class as the Canadian or American, but nevertheless it is good value for the money, and price, as stated previously, is more important nowadays than quality. Clothes pegs from the United States, of excellent quality, are being offered generally at 5s. c.i.f. and sometimes 4s. 9d., although one buyer states that he had an offer of United States this week at $1 c.i.f., but refused it because of cheaper German goods. This is equivalent at present exchange to 4s. 3d. It may be desirable, or indeed necessary, in order to encourage business, to quote

"delivered warehouse." In such a case 3d. a box will cover the charges for landing and conveying to the warehouse in Glasgow.

Although Germany is getting the bulk of this business, no one can tell how long she will continue in a position to do so. Furthermore, doing business with German exporters is not altogether satisfactory from a purely business point of view, and this, combined with the fact that Canadian firms are now beating United States firms in price, and are supplying just as good quality, leads to the belief that in this line Canadian firms may look for some useful business. Prices should be from 4s. 3d. to 4s. 6d. to compete with American firms in every way.

WASHBOARDS

Canadian washboards are considered here generally as of excellent quality. But in this line a cheap article is what is now required, in quantity, although a considerable demand exists for boards of a better quality, and this demand is met mostly by the two Glasgow manufacturers.

The bulk of the trade is being done by Swedish firms supplying inferior boards at 9s. 6d. to 12s. a dozen c.i.f. Single-side zinc boards of United States make are coming into this market at 17s. 3d. to 19s. a dozen c.i.f.

A Glasgow firm with many branches states that they used to import thousands of dozens of washboards twelve to fifteen years ago from the United States, but they do so no longer, and this confirms the statement of another firm that the demand is dwindling year by year for the reason that so few families in these times have washing done at home, people even of very slender means making use of the steam laundries.

The excellent quality of the Canadian washboard should, however, enable it to sell very well if the difference in price represents not more than the difference in quality.

SANITARY SEATS

The primary requirement of these seats for trade in Scotland is that they should be in one piece. Nothing else is wanted because of the dampness of the climate. Furthermore (and this is probably not well known in Canada), the Scottish market is more exacting than the English. The Scottish trade and the consumer, generally speaking, require higher quality than is the case even in England.

One large Glasgow firm of metal merchants and plumbers' suppliers who handle these articles state that they used to buy Canadian pieced seats, but they are now relying on British manufacture mainly. The cheaper quality will not sell in Scotland, nor will the imitation mahogany in any quantity. What is wanted here is a one-piece hardwood seat, usual size 24 inches by 16 inches, French polished, laid down in Glasgow at about 4s. Another firm says that 4s. 3d. is the highest figure at which such a seat could find a market.

German-made three-piece seats, which are coming in to some extent, are reaching the plumber at 3s. 6d. each, and are worth the money according to one importer.

Prices are of course in great variety, depending upon the kind of wood used, whether mahogany, imitation mahogany or hardwood, and whether the seats have tops or not, but for seats without tops the prices of those of British manufacture range from 4s. 9d. to 7s. 6d. each. The best seats have covers, but not many are sold.

One firm who have bought in Canada in the past, and would like to do so again, think that the Canadian finish is equal, or even superior, to the Scotch

finish, which is French polishing. The writer was under the impression that French polishing was not used in Canada because French polishers were hard to obtain, and that the American finish was used, but however that may be, this company is well satisfied with the results.

Firms contemplating this line are advised to send drawings of what they have to offer to this office, with full particulars and *c.i.f. prices,* and every effort will be made to obtain business for them. They are bought in gross lots.

In connection with these articles the housing question has of course a direct bearing on the demand. Glasgow, a growing city of one and a quarter million, is perhaps suffering from a shortage of houses more acutely than any important centre of the kingdom. The official estimate is that 57,000 houses are required to be built to meet the growing needs of the population to make up for the shortage accumulated during the past ten years, and to take the place of slum clearances. Since the war a certain amount of building has been done, but hardly the fringe of the difficulty has been attacked for reasons which need not be detailed here, and it will be many years before the congestion is relieved. But signs are not wanting that a determined effort is to be made to furnish new houses on a really wholesale scale, not only in Glasgow, but in all parts of the country, and this will naturally provide a large market for all kinds of articles used in dwellings.

PASTRY BOARDS

These are now coming mainly from Germany, prices ranging from 18s. a dozen for the 18-inch by 12-inch to 30s. for the 24-inch by 18-inch.

BROOM HANDLES

Considerable quantities of Canadian broom handles are coming into this market and competing against the Swedish 1-inch size at 21s. a gross c.i.f., and German at 19s. 6d. a gross. The Canadian article contains much better wood than the Continental, and the finish is much superior, and although they are more costly, they are worth it. Samples should always be forwarded with prices, as it is only on quality that Canadian makers appear to beat their Swedish and other rivals.

TOOL HANDLES

Most of the tool handles used in this country are of United States manufacture, and it does not seem that in the case of hickory handles Canadian manufacturers are in a position to compete with American firms because hickory has to be imported into Canada from the Southern States.

It is the case, however, that the supplies of hickory are becoming rapidly exhausted, and the time is approaching when some other wood than hickory will have to be used. While hickory is acknowledged to be in a class by itself for the handles of picks, hammers and the like, there can be no doubt that rock maple is admirably adapted to take its place.

In connection with the rapid depletion of hickory supplies, the following extracts from Report 311 presented to the United States Senate by the Secretary of the Forest Service in reply to a request by the Senate for information on the depletion of United States forests may be of interest. The report was rendered early in 1922:—

"In general, three-fifths of original timber is gone. We are using timber four times as fast as it is growing. One-fifth of timber left in country is hardwood, namely 460 billion feet. The United States once contained the most

extensive temperate zone hardwood forests in the world. The production of *hardwood products* on the past scale cannot long continue. The scarcity of high-grade oak, ash, hickory, poplar and walnut is now placing American industries in a critical condition. The exports of high-grade oak, ash and hickory will further increase the shortage for domestic use and tend to sustained high prices. The furniture industry, utilizing mainly high-grade hardwoods, began in New England, but through depletion of raw material supplies, had been forced to move westward, but in the last fifteen or twenty years the districts of the Middle West have been exhausted and there only remain limited areas in the north and south. The present sources of supply are largely the remoter and inaccessible portions of the southern Appalachians and Lower Mississippi valley. When these forests are cut out the industry will have exhausted practically their last resources of *old* growth timber.

"*Handles.*—For high-grade hickory and ash required by the industry, no satisfactory substitute has yet been found, and these two woods make up two-thirds of the total used. The supply comes mostly from the south. Here the most accessible timber has been taken. The few large concerns literally comb the country to secure these two woods. More and more it is becoming necessary to work into the more remote districts. Practically the entire territory within which hickory is found in commercial quantities is thus covered.

"Because of the difficulty in securing hickory and its rapidly increasing price, the vehicle and automobile industries are being forced to use steel substitutes.

"Government estimate of hickory standing, 16 billion feet; total hardwood, 460 billion feet; yearly consumption, 16 billion feet."

EXPORTATION OF CANADIAN STORE CATTLE TO GREAT BRITAIN

Information and Recommendations for the Scottish Market

Trade Commissioner Gordon B. Johnson

Glasgow, March 1, 1923.—The following excerpts are culled from a booklet just issued by Messrs. Wm. Bosomworth & Sons, cattle salesmen, Glasgow, in anticipation of the trade in Canadian store cattle with Great Britain which may be expected as a consequence of the removal of the embargo.

It will be noted that particular emphasis is laid by the writer on the importance of the quality of cattle which are sent over, as there will be many keen and some unfriendly eyes to observe differences between Irish and home-bred animals on the one hand, and Canadian on the other, and any comparison unfavourable to Canadian cattle will be eagerly seized upon and broadcasted. The firm above mentioned were particularly active in the campaign for the removal of the embargo.

With the removal on 1st April, 1923, of the embargo on the importation of Canadian store cattle in Great Britain, the shipping of Canadian stock to this country will be permitted once again, the shipments being restricted to (except under Special Order) steers and spayed heifers.

There exists in Scotland a ready market for Canadian store cattle, and in earlier years, before the imposition of the Embargo in 1892, large numbers were shipped to this market and sold here. To-day there is an even larger market, as there are now greater areas of land under cultivation, and consequently more feeding cattle are required. Many Scottish farmers and feeders purchased Canadian store cattle in those days of free importation, and were, on the whole, well pleased with their purchases. After careful inquiry throughout the principal markets and feeding districts of Scotland, one is assured that Canadian store cattle will once again be readily bought by feeders here, provided a suitable class of cattle is sent. One of the objects of this booklet is to convey some information to Canadian exporters as to the best class of cattle to ship.

CATTLE FEEDING SEASONS IN SCOTLAND

To appreciate properly the working of the export trade in store cattle, so far as Scotland is concerned, it is essential to understand as clearly as possible the nature of the great cattle-feeding business in this country. It is roughly confined to two main periods—(1) the period of grass feeding; (2) the period of stall feeding. For the grass feeding period, feeders buy their cattle during March and up to the end of May or June (according as the season is early or late), and for the stall feeding period, they buy their cattle from September to December.

These two periods are the seasons of the year when the largest number of store cattle would be bought, and are, accordingly, the times when the largest Canadian shipments should arrive on this market. During the other months of the year there would still be a market for smaller shipments, and this would largely be regulated by the important influences of an early or late season, and a shortage or abundance of root crops and feeding stuffs.

PRINCIPAL FEEDING DISTRICTS OF SCOTLAND AND THEIR MARKETS

The following counties constitute the principal cattle-feeding districts of Scotland:—

Stirlingshire; Perthshire; Kincardineshire; Fifeshire; Forfarshire; Aberdeenshire; The Lothians (counties of Linlithgow, Edinburgh and Haddington); Roxburghshire; and Berwickshire.

The principal markets which serve these cattle-feeding districts are: Glasgow, Edinburgh, Perth, Dundee, with auxiliary markets at Stirling, Cuper-Fife, Forfar, Aberdeen, Haddington, St. Boswells, and Berwick. Regular weekly sales are held at these markets which are all old-established centres and are well and regularly attended by farmers and feeders.

The ports of landing which serve the above markets are Glasgow, Dundee, Aberdeen, with Glasgow as the largest and most important centre.

PORTS OF LANDING AND THEIR ACCOMMODATION

GLASGOW

This is the chief port for Scotland and here excellent facilities exist for the landing, feeding, selling and distribution of cattle to all parts of Scotland. The cattle wharf is directly on the River Clyde and the largest steamers can be docked and discharged at it. The cattle walk straight from the steamer to the pens, where they can if desired be tied up in head stalls. The entire wharf and lairage is covered and roofed, and being specially constructed for the trade in foreign cattle, it is the largest and best equipped building of its kind in the country. There are hay and water troughs in each pen, two weigh bridges and two auction rings. There is at present accommodation for 3,000 cattle at any one time and, with ordinary sales organization, as many as 5,000 to 8,000 cattle can be cleared in one week.

There are large rail centres quite close to the wharf, and cattle can be dispatched at all hours to all parts of the country and to England. Cattle which are sold at Glasgow wharf can be railed to farms in any part of the country, and cattle intended for sale at inland markets can be landed at Glasgow and railed to the inland centres quickly and without delay.

Canadian fat cattle have been landed and sold at Glasgow wharf for many years past, and the working of the trade is well understood and well organized. There are also excellent facilities for slaughtering, dressing and selling any cattle which may be landed in a damaged condition, or for any other reason have to be slaughtered and sold in carcase form.

The corporation of Glasgow, who erected and own the wharf, have always been favourably disposed towards the Canadian cattle trade; they have lent continued and valuable assistance in the recent campaigns for the removal of the Embargo, and have always been most willing to grant any improvement or increased facilities which the trade required. They are already considering plans for an extension of the wharf accommodation to meet the anticipated needs of a large Canadian trade.

Glasgow is the most suitable port in Scotland for the landing and selling of Canadian store cattle, and it is also very suitable for cattle which are ultimately intended for sale at such inland centres as Edinburgh, Linlithgow, Stirling, Haddington, Perth, Cuper-Fife, and Berwick.

DUNDEE

Situated on the River Tay, on the east coast of Scotland, this port is suitable for the landing of Canadian cattle, and the largest steamers can be docked and unloaded there. The cattle lairage is adjacent to the dock, and there is at present accommodation available for 700 head of cattle at any one time. This accommodation will be enlarged to suit

requirements whenever necessary. There is a sale ring in the lairage, and suitable facilities for feeding and watering the cattle. A railway line adjoins the lairage, and cattle can be dispatched to all parts of the country.

Dundee is a suitable port for cattle intended for the districts of Forfarshire, Perthshire, Fifeshire, Kincardineshire.

ABERDEEN

This port is also on the east coast of Scotland, and can accommodate steamers up to 2,500 tons net. Some of the buildings which were in use prior to the imposition of the Embargo are available, and the Harbour Commissioners are now considering the provision of suitable buildings to meet the requirements of the trade. It is proposed to provide accommodation for 750 cattle at any one time, with up-to-date feeding and watering arrangements. There is also a sale ring included in the scheme. Aberdeen serves the districts of Aberdeenshire, Banff, Elgin, Nairn and Kincardineshire (northern portion).

CLASSES OF CATTLE BEST SUITED FOR THE SCOTTISH MARKET

The successful exportation of store cattle from Canada to Great Britain depends to a very large extent on the classes of cattle shipped. There has been a strong and continued opposition, in some quarters here, to the removal of the Embargo, and in Canada's best interests it is essential that her exporters should ship only the classes of cattle which are suitable for the requirements of feeders here, and fit to compete favourably with Irish cattle and home bred stock.

Only by this course and the most rigid adherence to these condition, can Canada hope, as a new comer, to secure a permanent footing in the British markets and establish a large and profitable export trade with the Mother Country.

Much criticism has been passed regarding the classes of cattle which are to be expected from Canada, and the shipments will be watched very closely and compared with the Irish and home stocks, and it is to Canada's interest to see that she sends cattle which will bear such scrutiny and comparison with credit to themselves. This point should be continually borne in mind, as its significance cannot be overestimated.

Classes of cattle best suited for the Scottish markets are: (1) A good class of Polled Steer, weighing about 1,000 live weight, landed in Scotland, age 2 to 2½ years, of beef breeding, in good flesh, capable of dressing about 50 per cent of the live weight, and to be prime beef after three to five months' feeding.

(2) A good class of heavier Polled Steer weighing 1,100 to 1,250 pounds live weight, landed in Scotland, age 2½ to 3½ years, of beef breeding and good quality, capable of dressing about 53 per cent to 55 per cent of the live weight, and to be prime beef after two to three months' feeding.

Beef breeding denotes the general recognized breeds, or breed crosses for beef cattle:—Shorthorn Crosses, Hereford Crosses, Polled Aberdeen-Angus Crosses, Pure Polled Aberdeen-Angus cattle.

(3) There is also a certain market for Spayed Heifers suitable for feeding, of beef breed, age two to three years.

(4) Under Special Exportation Order, Bulls and Milk Cows can also be shipped, but large exportations of these classes are not anticipated. Arrangements can be made, however, for special shipments when required.

HORNED CATTLE NOT RECOMMENDED

The great majority of the Scottish feeders are in favour of polled cattle, especially for stall feeding. Horned cattle are thus more difficult to sell, and in most cases, command a lower price than polled cattle.

Branded cattle are not recommended as they always realize less in the beef market on account of the lower value of the hides, and feeders would have this in mind when buying such cattle to feed.

There is also a general objection to aged cattle. What feeders want is a good young polled steer not more than two to three years old.

The animal which commands the highest price in the beef market here is a choice polled steer about two and a half years old, weighing about 1,150 to 1,250 pounds live weight, when fat, and feeders require a class of cattle which will accord nearly with these requirements when the cattle are ready for the beef market.

GENERAL RECOMMENDATIONS

It being of the very greatest importance that nothing but a really good class of store cattle should be shipped, it is advisable for shippers to examine their cattle carefully before shipment, and see that they are well bred, healthy and level in lots. No rough, unsound

or inferior cattle should be sent, and it is also desirable to send polled cattle in preference to horned cattle. Shippers should endeavour to arrange for their shipments to arrive during the periods when the largest numbers of cattle can be disposed of here.

It is strongly recommended that Canadian exporters should send the bulk of their shipments to Glasgow, as it is the principal port in Scotland and has the largest and best equipped cattle yard in the country. Glasgow is a great market in itself, and in addition it is the best landing centre for all cattle intended for the inland markets.

When Canadian cattle are landed at Glasgow, they can be offered for sale here, and if unsold, can then be railed to any inland centre. This gives the Canadian shipper the choice of more than one market and the best opportunity of disposing of his cattle to advantage. It must also be borne in mind that on Canadian cattle which are sold at Glasgow there is a minimum and a much lower expense than on cattle which are sent to an inland market for sale; this point is clearly shown in the table of expense rates, which follows.

TABLE OF EXPENSE RATES ON CANADIAN STORE CATTLE

On Canadian store cattle sold at Glasgow, the expenses incurred after landing amount to approximately 26s. per head, assuming that sale takes place within three days of landing. For every additional day an extra charge of 3s. to 5s. per head is incurred. The above sum includes port dues, landing dues, wharf lairage, feeding and men attending, salesman's commission.

Inland Markets

On cattle which are landed at Glasgow and railed to an inland market for sale the expenses incurred after landing are approximately: Cattle sold at Stirling, 30s. to 35s. per head; at Edinburgh, 36s. to 42s.; at Perth, 36s. to 42s.; at Haddington, 36s. to 42s.; at Cupar-Fife, 38s. to 44s.; at Forfar, 40s. to 45s.; at Berwick, 40s. to 45s.

The above charges apply only to cattle which are sold within four days after landing. For every additional day an extra charge of 3s. to 5s. per head is incurred. The above charges include port dues, landing dues, wharf lairage, feeding and men attending, loading and unloading, rail charges to inland markets, dues and feeding thereat, salesman's commission.

It will be observed, from the table of rates, that the lowest expense is on cattle which are sold at Glasgow.

The expenses incurred before landing cannot be accurately stated, as railway freight to port of shipment in Canada, ocean freight, and marine insurance, are items which vary.

CANADIAN FAT CATTLE

During the last few years the exportation of Canadian fat cattle to Scotland has been resumed. The cattle are landed and sold at the cattle wharf, and sales are effected both by private treaty and by public auction.

Buyers from a wide area regularly attend these sales of Canadian fat cattle and large numbers have been disposed of. The classes of cattle which command the highest prices, are:—

(1) Good young steers, age two to three years, of beef breed, choice in quality, weighing about 1,100 to 1,200 pounds, live weight, landed in Glasgow, capable of dressing 55 per cent to 60 per cent of their live weight.

(2) Prime young heifers of choice quality and beef breed, and of similar weight and age to the above class.

There have also been sold considerable numbers of heavier steers weighing 1,300 pounds, live weight and upwards, of beef breed, and choice quality. Also certain numbers of fat bulls and cows.

Considerable shipments of Canadian fat cattle are landed at Glasgow, have been slaughtered, and the carcases sold in the Glasgow Dead Meat Market or at the Dead Meat Sales at Edinburgh and Dundee.

With the removal of the Embargo, a larger market will be opened up for the sale of Canadian fat cattle, as they no longer require to be sold for slaughter, but can be railed to such inland markets as Edinburgh and sold there alive. All cows and bulls will continue to be sold at port of landing as at present.

The expense rates on Canadian fat cattle after landing are similar to those stated in the case of store cattle, with the addition of tuberculosis insurance premiums: 5s. per head on cows, 2s. per head on bulls, 1s. per head on steers and heifers.

WEDDEL'S ANNUAL REVIEW OF THE FROZEN MEAT TRADE

Trade Commissioner Harrison Watson

London, February 28, 1923.—Although Canada appears to have temporarily ceased to supply frozen or chilled meat to the United Kingdom, the removal of the embargo on the importation of store cattle arouses particular interest in the meat requirements of the population of Great Britain, which are dealt with so comprehensively in the *35th Annual Review of the Frozen Meat Trade* just issued by Messrs. W. Weddel & Co., Ltd.

In common with practically all businesses, the imported meat trade has found 1922 a very difficult year. Their troubles were added to, and indeed largely caused by, the heavy and continued falling-off in the Continental demand for frozen meat, chiefly beef, which had been established during the war. This had created a large increase in previous sources of supply, and as Messrs. Weddel & Co., Ltd., report that in the four years since the Armistice Continental requirements have shrunk from 500,000 to 120,000 tons, it is easy to realize the disorganization which has been caused.

As regards the United Kingdom itself, there was a contraction in imports during the year under consideration in comparison with 1921, but the permanent position is quite different, because this country has for many years been dependent upon outside sources for a large proportion of its meat supplies. According to official returns, the importations of frozen and chilled meats into the United Kingdom in 1922 totalled 821,666 tons, as compared with 917,414 tons in 1921, 810,415 tons in 1920, and 720,257 tons in 1913.

A feature of interest is that in 1922 the percentage of all meat imported of Empire growth was only 35 per cent, as compared with 40 per cent in 1921, largely accounted for by the reduction in supplies of mutton and lamb from New Zealand.

As regards prices, the report states that while there was some recovery from the staggering collapse which occurred in 1921, the average wholesale value of imported meats was 149 in 1922, in comparison with 180 in 1921 and 295 in 1918, on the basis of 100 in 1913. The fall, however, was not evenly distributed, because it was practically confined to beef, which appears temporarily to have lost favour, and supplies of which were excessive. Moreover, as the report admits, much of the frozen beef offering was inferior in quality and condition, and the market at one time was weighed down by an incubus of old meat which had been in store for some time.

THE QUESTION OF PRICES

As the high prices which retailers have been charging for imported mutton and lamb, at a time when it was known that there was a heavy slump in wholesale quotations, and stocks of meat in the country were large, has been the subject of constant complaint during the past year, and openly attributed to manipulation of prices, the following explanation of the position given in the report is of particular interest:—

"The high level of prices maintained for mutton and lamb, despite the arrival of supplies heavy enough to have produced a slump in normal times, was a surprise to many people in the trade, and can only be accounted for by the assumption that mutton, as an article of diet (probably as a result of its scarcity during the war) has been steadily gaining in popularity in recent years. It is quite evident that much larger supplies could have been absorbed last year at satisfactory prices, had they been available. Indeed, there was a very serious shortage of mutton and lamb towards the latter part of the year, and what would have been a critical situation was only averted by the arrival of unusually heavy shipments of lamb from Australia, which, though mostly

small in carcass, and of poor quality, went rapidly into consumption at high prices."

This is supplemented by the following reason which applies to all varieties of meat:—

"A general impression was held that the prices charged by retailers had failed to respond sufficiently to the reductions made in wholesale values, and the retail trade found it difficult to convince the public that their persistent demand for choice cuts and small joints of the best-quality meat, and their utter neglect of the cheaper parts of the carcass, prevented any further lowering of prices. Certainly on frozen lambs, at the average wholesale prices ruling last year, it is known that the retail margin must have been very small."

WEDDEL'S VIEWS ON THE PROSPECTS OF THE STORE CATTLE TRADE

It is impossible here to even make reference to the wealth of information and statistics of all kinds which the report includes, but its study can be recommended to all persons interested in the meat requirements of Europe. For the purpose of this report, it will suffice to reproduce verbatim the section of Messrs. Weddel's review relating to Canada, which is as follows:—

"Except for some shipments of boxed beef and offal and a single parcel of chilled beef, amounting in all to 4,160 tons in 1922, Canada has again dropped out of the running as a shipper of frozen or chilled meat to this country. It was hoped that the successful start made with chilled beef shipments in 1921 would have been followed up, but apparently the prices ruling in this market for chilled beef last year were unremunerative, and Canadian growers, therefore, confined their attention to the more profitable shipment of fat cattle for slaughter, for which they obtained prices close up to the high level of home-grown cattle. The number so shipped was 19,960 head as compared with 31,794 head in 1921.

"The latest live stock returns, collected in June, 1922, give the number of cattle as 9,819,869 head against 10,206,205 head in 1921, and 3,262,626 sheep as compared with 3,675,860 in 1921.

"The embargo on Canadian store cattle has now been definitely removed by Act of Parliament, after a long period of acute controversy, during which public opinion was pretty evenly divided. Attention must now be directed to the question as to whether or not this new trade is likely to assume important dimensions.

"It has been stated that Canada will have a surplus of 200,000 store cattle to export; but the difficulties attaching to the transport of that number of animals across the Atlantic seem to be overlooked by those who assume that importations on a large scale can be started immediately. The ordinary liners have only limited accommodation for live stock. For a trade of this magnitude specially fitted steamers would have to be used. But the maximum number of cattle that these would be able to carry is about 1,000 each, which means 200 ship-loads; and, as the trade is a seasonal one, the vessels would have to arrive on average at least one every day. As there would be little or no outward cargo for these steamers, the rates of freight would have to cover the return voyage in ballast, and the laying-up of the ships in the off season. The organization of the business would call for a considerable amount of capital outlay, which is not likely to be forthcoming without some definite assurance that the trade would be permanent; but, with the prospect of the American market again becoming available, Canadian breeders are not in a position to give any such guarantee. The proposition is not utterly impracticable, but it is manifest that a year or two must elapse before any considerable number of Canadian store cattle can be imported into this country. In the meantime the problem of the American demand will be settled one way or the other."

CONDITION OF THE BACON TRADE IN THE UNITED KINGDOM

Trade Commissioner J. E. Ray

Manchester, March 8, 1923.—As the packers of Canada are fully aware, the condition of the bacon trade in the whole of the United Kingdom during the last two months at least has caused heavy losses to both Canadian and United States exporters. It would be a pleasure to report some improvement, but unfortunately the importers of Manchester cannot announce any change for the better. On the contrary, they are pessimistic, and contend that the transatlantic packers will be compelled to face adverse conditions for some time to come. There are approximately 55,000 boxes of American bacon lying at Liverpool at the present time. A large proportion of this is bought by importers and shows a very heavy loss. Selling prices at the time of writing approximate for most cuts only 15 per cent to 20 per cent over pre-war prices, and do not correspond in any way with the higher costs of production.

The price depreciation is not due to defective quality, but to the poverty of demand in conjunction with the abnormal killings in Denmark, the favourable rate of exchange between that country and Great Britain, and the British consumers' preference for the Danish product. The retailers naturally sense the tastes of their customers, and as long as the latter insist upon demanding a particular product, it is in the interests of the former to see that the demands are catered to.

With regard to the exchange, its condition constitutes an asset of great value to the Danish packers. In comparison with the British and Canadian rate of exchange, that of Denmark confers an advantage of from 26s. to 30s. per cwt. upon Danish bacon, whilst various conditions, including exchange, involve a loss of from £6 to £7 per box on Canadian bacon in competition with the Danish product.

It must also be borne in mind that Canadian and American bacon (both, it is to be feared, known only as "American" to the majority of consumers) have much prejudice to overcome owing to the evil reputation it gained during the war years when so much inferior stuff found its way across the Atlantic. Again, it should not be forgotten that the purchasing power of the people at the present time is much below normal on account of depressed trade conditions.

With regard to the minor position held by Canadian bacon in the estimate of consumers, as compared with English, Irish, and Danish, the writer has consulted a number of Manchester firms with a view to obtaining their suggestions regarding the best means of making the Dominion's products more popular. The only suggestion advanced is an advertising campaign. Whether the Canadian packers would feel justified in spending $50,000 upon such a scheme is for them to decide. There can be no doubt that the popularity of numerous foods in the United Kingdom is due to advertising. More should certainly be done by Canadian exporters to give distinctiveness to the products which they sell on the British market, the origin of which should be clearly indicated.

Certain Canadian packers are now shipping a proportion of their bacon to the north of England markets packed in bales on the Danish principle. This is an effort to raise the standard of Canadian bacon and place it closer to Danish. It has been very difficult during the last few months to make very much progress with this baled product, good as it is, because of the very large quantities of Danish bacon shipped to Great Britain. However, there are possibilities connected with this method of packing, as already Canadian bacon in bales is at a considerable premium as compared with the product sent in boxes.

MARKET FOR CLOVER MIXTURES AND TIMOTHY IN THE BRISTOL AREA

Acting Trade Commissioner Douglas S. Cole

Bristol, March 8, 1923.—At the present time best Canadian clover mixed is being purchased at £6 to £6 5s. c.i.f. Cardiff or Avonmouth, and at this price Canadian exporters can find a market for all their supplies. Apparently there is but little clover mixture available from New Brunswick or Quebec, particularly the former.

As regards timothy, this brings about 7s. 6d. less, or approximately £5 13s. c.i.f. Cardiff. Prices must be in this vicinity for timothy in order to compete with English meadow, which is being purchased at £4 10s. in the stack, with charges of approximately 10s. for haulage, 6s. for trussing, and 2s. corded tie in lieu of baling. This brings English hay to £5 8s. approximately.

The big demand is for clover mixture, and one large importer in this area, who not only supplies the War Office but also does a large trade in South Wales for colliery ponies, is desirous of obtaining in the vicinity of a further 100 tons per week of timothy alone or best clover mixture at the above-mentioned prices.

Canadian exporters must note that there is no demand in England for second-class stuff, F.A.Q.; owing to the last season being an extremely wet one, there are very large quantities on the market.

As this office has had many offers of Canadian alfalfa, it may be noted that this is not liked for horses, it being a staple feed for cows. English farmers make a point of supplying their own stock with their own hay, and consequently the demand for alfalfa is extremely limited.

As regards the English 1923 crop, the clover mixtures are already a foot up from the ground, and from all appearances it looks to be more than an average season. It is suggested that Canadian firms keep this factor in mind when offering quotations for 1923 crop, which will be marketed from June next.

Many Canadian hay dealers when shipping cash against documents are deducting 10 per cent to cover shortage and adjustments.

BRITISH INDUSTRIES FAIR, BIRMINGHAM, 1923

Acting Trade Commissioner Douglas S. Cole

Bristol, March 2, 1923.—This important section of the British Industries Fair, which was again held at Castle Bromwich Aerodrome, from February 19 to March 2, had not as many exhibitors as last year, the numbers being 400 as compared with 480 last year. The outstanding feature which immediately appeals to the visitor is that the Birmingham section is unusually representative of the wide range of Midland hardware manufactures. The year 1922 has been an exceedingly difficult one for manufacturers, and this may possibly account for the smaller number of exhibitors. In some important respects conditions are still unfavourable. European customers are not developing new purchasing power as rapidly as could be wished; neither are political conditions, so far as the Continental point of view is concerned, such as to encourage the undertaking of speculative commitments. One encouraging factor, however, is that stocks both in the United Kingdom and abroad stand in unusual need of replenishment.

An innovation of this year's fair was the maintenance of an air passenger service by the Daimler Air Company between Manchester, Birmingham, and London.

LATER DATE NEXT YEAR

Each year since 1920, when the Birmingham section was inaugurated, it has been realized that February is not a favourable season for visitors from warmer countries who would ordinarily be doing business in England. Next year's fair is to be held in May.

SPECIAL FEATURES

The general classification of this year's exhibits is as follows:—

Group.
- I—Brassfoundry, Hardware and Ironmongery.
- II—Metals, both Ferrous and Non-ferrous and Alloys.
- III—Construction, Building and Decoration.
- IV—Power, Light, Heating, Cooking and Ventilating.
- V—Engineering.
- VI—Agriculture.
- VII—Mining.
- VIII—Motors, Motor Cycles, Cycles, Accessories, and Perambulators.
- IX—Brewing, Distilling and Catering.
- X—Guns, Saddlery and Harness.
- XI—Services, which include all Types of Trade Journals.

Of the various groups the most outstanding is Group I, particularly the hardware section. Exhibitors in this line are possibly the most optimistic for the coming year. Recent months have shown a decided tendency for trade to improve, especially as prices have become more stabilized and buyers have regained confidence. Trade depression of course is still very evident, but if anything, manufacturers are to-day turning out a greater range of articles than ever, and particularly is this true of the extensive display of aluminumware. During the war some Canadian manufacturers of aluminumware were able to get their products into the United Kingdom market, but from 1918 on the English manufacturers developed their resources to a considerable extent, their chief competitors being Germany. The Safeguarding of Industries Act with its imposition of a duty of $33\frac{1}{3}$ per cent has given much assistance to the British manufacturers, but the depreciation and fluctuation of the German mark still imposes a severe handicap. The most notable development in English-made aluminum goods has been in regard to teapots and kettles, the former now being available in numerous shapes and designs, whilst complete tea sets with salver are a notable achievement.

Other outstanding exhibits were the products of Messrs. W. & T. Avery Limited, manufacturers of weighing, testing and counting machinery. On their stand a testing machine was shown capable of a full load of 50 tons, and upon the occasion of H.R.H. Duke of York's visit, during the first week, an exhibit of testing beans for tensile strength was made.

Another exhibit was that of Messrs. Nobel, who showed to what extent explosive and propellent manufacturers can turn their products in the various ways of celluloid and nitro-cellulose productions for commercial uses.

CANADIAN SECTION

An entire exhibit of Dodge wood split pulleys as manufactured by the Dodge Manufacturing Company of Canada, Limited, was shown by the Gandy Belt Manufacturing Company, Limited, the United Kingdom agents. It is a credit to Canadian manufacturers that this product has made such a success on the English market. There are other English manufacturers of wood split pulleys, but none have the excellent rock maple from which this Canadian article is made. English firms are making laminated pulleys, but they are

made only from four pieces or less and have not the strength of the Canadian-made article. As compared with iron pulleys, the Canadian wood type is from 50 to 100 per cent lighter and the price is from 50 to 100 per cent less, whilst the coefficient of friction between iron and wood pulleys is much in favour of the latter.

Messrs. Meakins & Sons, of Hamilton, Ont., whose headquarters in the United Kingdom are at Liverpool, had a complete display of "set-in rubber" brushes, which are vulcanized in rubber and are guaranteed against deterioration of the bristle in any preparation. This Canadian company are also showing broom handles, axe handles, etc., as manufactured by the Nova Scotia Hardwood Products Limited, Amherst, N.S.

Another Canadian stand was MacLean & Company of Great Britain, Limited, who were showing the various publications of the MacLean Publishing Company, Limited, of Toronto, particularly seven commercial journals which would be of greatest interest to Birmingham manufacturers.

The uses of asbestos were shown by Bell's United Asbestos Company and the Cape Asbestos Company, Limited, both of which concerns were showing some Canadian asbestos and its wide ramifications.

CANADIAN NATIONAL EXHIBITION

One prominent catalogue shown at the stand of the Federation of British Industries was published on behalf of the Canadian National Exhibition, which is to be held in Toronto from August 25 to September 8 next, and Major Dibben, organizer of the Birmingham area, stated that several inquiries had been received regarding it. The British section in the forthcoming exhibition is to contain a block of stalls of uniform design grouped about a central propaganda bureau of the Federation of British Industries.

OPPORTUNITIES FOR NEXT YEAR

The attendance at the Birmingham Fair during the first week was rather light owing to the fact that the principal buyers first visit the British Industries Fair at the White City, London, going to Birmingham for the second week. Visitors have attended from all parts of the United Kingdom and from nearly every country in the world.

For next year's British Industries Fair in Birmingham there will be a determined effort on the part of the management for a separate hardware section of Canadian products, and both Mr. F. Hilary Jones, chairman of the Publicity Committee, and Mr. Charles Stanley, the general manager, were emphatic in their statement that not only were they prepared to spend a certain amount on advertising next year's exhibition in Canada, but would more than welcome full co-operation of the Canadian Department of Trade and Commerce and the Canadian Manufacturers' Association. This fair has an established reputation, and is strictly a business enterprise to which admission is only obtainable by invitation, and the organization is quite complete. In view of the possibility of Canadian manufacturers being interested in the exhibitors and particulars of same, a copy of this year's catalogue printed in three languages—English, French, and Spanish—for the Birmingham section has been forwarded to the Director, Commercial Intelligence Service, Department of Trade and Commerce, Ottawa, and may be seen upon application.

TRADE CONDITIONS IN THE BRITISH WEST INDIES

Trade Commissioner E. H. S. Flood

Barbados

Customs returns for the Colony, which have just been issued in summary, show that the receipts exceeded those of 1921 by £30,250. Imports from the United Kingdom show a decrease of over 4 per cent, while those from Canada show only a small falling off. Exports to the United Kingdom increased slightly, while those to Canada remained about the same.

The harvest season is in full swing. In the last week of the month the local sugar market rose to the highest point reached since 1920, and some large sales were reported. The syrup market, however, did not respond equally and is a little low as compared with sugar. The estimate for the sugar crop has risen, and it is now placed at 68,000 tons.

During February the estimate of the quantity of molasses to be manufactured in the coming year has undergone a change owing to the advance in the price of sugar. Some recent sales of syrup have been made on the basis of 53 cents f.o.b. Bridgetown, but as the brokers of molasses would not contract for large quantities at this price, the planters considered it to their advanage to sell their canes to the sugar factories, and this has reached such proportions as to make it appear that syrup will not be manufactured in as great a quantity as was expected. It is claimed that better price for cane per ton can be obtained from the sugar factories than in converting it into syrup.

Stocks in the dry goods trade are normal. The outlook for Easter business is much brighter than was anticipated, owing to the recent advance in sugar. An advance in the price of textiles has taken place and has had the effect of somewhat curtailing orders, merchants making purchases for immediate requirements only.

The provision market is fully supplied with flour, cornmeal and rice. The fish market is rather low, landings being restricted to shipments by steamer and a sufficient stock is on hand to meet present demands. Good Newfoundland cod is fetching $27 and $28 and haddock $24. Recent arrivals of potatoes were sold at $2.40 per barrel. The market is also stocked with oats and pollard, oilmeal is reported scarce. Sales of oats have been made c.i.f. at $4.10 per bag, and pollard at $1.45.

Approximately 1,000,000 feet of white pine and spruce have been received which put the market in good supply, and it is advised that other shipments are on the way, sold to arrive. Prices quoted are $56 for white pine, and $45 for good quality spruce. Receipts of shingles have come to hand, being lotted at $3.75 to $4.80 per M.

Trinidad

The revenue fell off by over £12,000 in 1922, but drastic reductions in expenditure for 1923 are expected to give a surplus at the end of the year. Among the bills that are to be handed down to the Legislative Council for consideration is one to provide for the registration of business names in the Colony. Its object is to provide that persons carrying on business under any name other than their own shall register in order that the public may know with whom they are dealing. Under its provisions the names of all partners must be disclosed.

NOTES AMONG THE ISLANDS

St. Kitts.—The returns show that the revenue of the colony fell off last year some £12,000, due chiefly to a poor crop—the low price obtained for sugar, and the absence of a market for the island's cotton. Climatic conditions experienced during the growing season were unfavourable, the rains light and badly distributed, in consequence of which, the Botanic Station reports that the crop of sugar will be short, and incidentally that no syrup will be manufactured in the present year.

Dominica.—The trade revival that was generally looked for during the past year has not yet been realized. There is, however, an improvement in the lime juice market, and the indications are that an early call for fruit for export, especially bananas, will be made, thus widening the field of industry in the island. Already an influential company has begun operations in St. Lucia to encourage fruit growing, and are distributing large sums of money in putting into cultivation new tracts of virgin soil in the island, and creating in this way a more general interest in the fruit industry.

Grenada.—The returns just published of the principal articles imported into Grenada for 1922, show increases over 1921 in apparel, boots and shoes, butter, cotton piece goods, oats, salted meats, cotton seed oil, refined sugar, tobacco and cigarettes. In the case of flour, the quantity was greater but the value less. Nearly all the flour came from Canada, the United States contributing only about one-tenth. Less fish was imported, the decline being chiefly in fish from Newfoundland. In exports, there was a falling off in both quantity and value of cocoa, which is the principal export of the Colony, and also in cotton and cotton seed. The increases were in lime juice, nutmegs and mace.

MINING IN BRAZIL

Trade Commissioner E. L. McColl

Rio de Janeiro, February 23, 1923.—The annual production of gold in Brazil is valued at slightly less than $3,000,000. Placer mining is practically non-existent. From the mines operated by the St. John del Rey Mining Co., at Villa Nova de Lima, and the Ouro Preto Gold Mines of Brazil, Ltd., at Passagem de Marianna, both in the State of Minas Geraes, an average of $2,750,000 worth of gold per annum is recovered.

The ninety-first annual report of the St. John del Rey Mining Co. states that the company crushed during 1921, 167,200 tons of mineral, recovering 121,811·40 ozs. troy of pure gold. The bullion realized £524,794 at par value, plus $121,358, which was received as a premium. Silver to the total value of £4,750 was also recovered and sold. The mineral is crushed and then subjected to cyanide and precipitation processes which result in the recovery of 92·52 per cent of the gold. A considerable quantity of Canadian cyanide manufactured at Niagara Falls is used.

A very large amount of hardware supplies is consumed annually in these mines in the shape of tools, cables, explosives, etc. The last annual report of the company places stock on hand in the stores department at £226,464.

The only other mine at present worthy of mention is that of Passagem, near Ouro Preto. During the year 1921 this company crushed 82,500 tons of ore producing 26,769 ounces of fine gold and 578 ounces of fine silver. The gold produced realized £142,456. The total gold extraction was 90·35 per cent. Of late years the diamond industry has to some extent revived. The present estimated output of diamonds, including the black quality used for cutting and

drilling, is about 20,000 carats per annum. The principal diamond mine is the Boa Vista, but it is a very modest concern. It has an average annual production of roughly 1,000 carats valued at about $37,000. Semi-precious stones such as tourmalines, aquamarines, topazes, etc., are found in considerable quantity in Brazil. Amethysts occur in nearly every state but they are chiefly found in Rio Grande do Sul. Copper deposits exist in Bahia, Rio Grande do Sul and Parahyba but are not worked, while Santa Catharina claims deposits of lead. Zinc is found in Minas, but the deposits are insignificant.

Manganese is found chiefly in Minas Geraes and Matto Grosso. The exports of this ore for 1920 and 1921 were 453,737 tons and 275,694 tons respectively, while for the ten months ending October 1922 exportation had increased to 306,741 tons. The United States is the chief purchaser. Other minerals such as monazite, nickel, mica, graphite, phosphates, zirconium, aluminium, chromite, etc., are found in Brazil. There is an abundance of first grade iron ore in various parts of Brazil, but chiefly in the State of Minas Geraes. While there is plenty of water power, there is no coal available close to the deposits. There is a large quantity of coal in Rio Grande do Sul, but the difficulty of transportation prevents it from being an asset of the iron and steel industry. It looks as if this difficulty was going to be overcome by the use of electrical power and charcoal derived from the eucalyptus, a fast-growing tree which produces an excellent wood for this purpose in from eight to ten years. The Government has encouraged the growing of these trees by means of a bonus, with the result that there are now very large plantations, especially along the railways. Owing to the growing needs of Brazil and the ever-increasing quantity of iron and steel which is imported into the country, public opinion is strongly in favour of developing the national resources, and the Government is giving every encouragement and support to the production of Brazilian pig iron and steel. Considerable research work has been done at the Ouro Preto School of Mines. This institution has an electric furnace of its own design, where it is successfully smelting ferro-manganese.

Imports of iron under the heading of cast, pig, puddled and filings, for 1913 amounted to 19,623 tons, but for the year 1921 this importation had fallen to 1,079 tons. It may therefore be said that all the pig iron required for ordinary purposes is produced within the country. The largest furnaces are those of the Esperança Company, which turn out about 15,000 tons of pig iron per year, the remaining production being divided between two other companies. There are two electric iron-reduction furnaces.

A list of purchasers of mining supplies in Brazil is on file at the Department of Trade and Commerce, Ottawa, and may be obtained on application to the Director, Commercial Intelligence Service (quoting file T.C.-4-120).

OIL INDUSTRY IN VENEZUELA

Mr. E. H. S. Flood, Canadian Trade Commissioner in Barbados, writes under date February 7, 1923, that during the month of January increased attention has been directed to the oil industry in Venezuela, especially among those engaged in oil finding in Trinidad, as the latter colony is the natural entrepôt for certain sections of Venezuela, and the Venezuela oil industry would naturally be to some extent contributary to the oil industry of Trinidad. Operations in Venezuela have become suddenly of considerable importance, one of its leading companies reporting a rich strike at one of its wells which is yielding 90,000 barrels a day. Extensive drilling operations are being carried on in various other parts of the oil area, and it is stated that the recent discoveries have placed Venezuela among the leading countries producing oil.

CONDITIONS IN THE UNITED STATES

Frederic Hudd, Trade Commissioner in the United States

New York City, March 15, 1923.—There continues to be a pronounced activity in all industries and the shortage of both skilled and unskilled labour in the textile, steel, and coal industries has not been made up. In many industries activity is reported to be greater than at any period since 1920, and in some cases it closely approaches capacity, more particularly in the case of textiles, iron and steel, and automobiles. The activity in the building industry has also been maintained. The advance in the prices of many basic commodities continues; there is additional borrowing from the banks and money rates are slightly higher. The Federal Reserve Board's index shows that production in basic industries was 6 per cent higher in January than in December and reached a volume which was exceeded only in May of 1917. Wholesale trade is reported to be good, and in retail trade in dry goods and allied lines there has been less than the seasonal dullness. In the manufacture of agricultural implements and other goods for sale to farmers there is increased activity, based upon an expected improvement in the agricultural situation. In many lines the usual seasonal slackness has not appeared or has been less pronounced than anticipated.

CONDITIONS IN THE WEST

In the west reports indicate that industrial activity is being maintained and that there is a greater distribution of merchandise. Premiums are being paid for prompt shipment of steel. The automobile industry is operating at record volume, and sales of dry goods are from 10 to 20 per cent over last year. There is a greatly increased traffic on all western lines, with a continued shortage of cars.

THE STEEL INDUSTRY

As an evidence of the developments in the steel industry, production of steel ingots in February averaged about 44,000,000 gross tons a year, against 43,500,000 tons in January, 40,000,000 tons in the last three months of the old year, and 34,000,000 tons in the six months preceding, when the steel industry was under the influence of the coal strike. These computations are based on the monthly report of the American Iron and Steel Institute, which gives the production of thirty companies in February at 2,919,017 tons as compared with 3,251,694 tons in January.

THE RISE IN PRICES

Statistical returns of the Bureau of Labour show that there have been increases in the prices of clothing, fuel, metals, building materials, chemicals, and house furnishings, but these increases have been offset by declines in farm products and food. Recently there has been a rapid rise in some of the basic commodities, among which are corn, beef, cotton, wool, silk, hides, lumber, rubber, linseed oil, copper, lead, and pig-iron. It is evident that unless the price of raw materials is checked, further increases will take place in the price of consumption goods. This consideration has given rise to predictions that the present business activity will be short-lived, and that merchants buying well in advance are liable to be left with high-priced goods, which the public will not take, as a result of resistance to the increasing cost of living. The shortage of labour is likely to prove a more immediate check on business activity than increasing prices. Existing immigration legislation has practically cut off that constant supply of unskilled labour upon which the industries

of the United States were always more or less dependent. A new immigration bill has been reported to the House of Representatives, which is designed to have the effect of bringing some relief to the situation.

COMPANY ACTIVITY

As an indication of corporate business activity, returns now available indicate that 671 new companies with an authorized capital of $100,000, or more, were organized under the laws of the various states during February, representing a grand total of $700,708,300. While this is not up to the January total, the figures covering the authorized capital show a material increase over January a year ago, when 702 new enterprises took out charters involving a sum of $591,404,300 in the aggregate. Since January 1, 1,589 new concerns have been incorporated with a combined authorized capital of $1,610,402,100. In the first two months of last year, 1,744 were filed involving an aggregate of $1,435,056,200.

THE MONEY MARKET

Of late foreign exchange has not been marked by noteworthy fluctuations. The discount on the Canadian dollar in New York has risen steadily, and it is now in the neighbourhood of nearly 2 per cent, due largely to the falling off in the wheat movement.

An important development in the money market was the advance of the discount rate from 4 to $4\frac{1}{2}$ per cent on all classes of paper at the New York and Boston reserve banks, which took place on February 23.

NOTES ON THE ARGENTINE PAPERBOARD MARKET

ASSISTANT TRADE COMMISSIONER P. W. COOK

Buenos Aires, February 19, 1923.—The Argentine demand for the various types of paperboard is generally steady. The last published statistics, those for 1917, indicate an importation of 6,736,429 kilos of "Carton," or heavy weight, and 329,996 kilos of "Cartulina," or light weight paperboard. The more important sources of import were as follows:—

	"Carton"	"Cartulina"
Holland	2,315,411 kilos	17,953 kilos
Sweden	1,932,100	15,926
Norway	1,376,885	......
United States	859,841	210,589
United Kingdom	156,945	16,917
Spain	29,893	53,475

"Cartulina" is the term applied to paper products weighing over 200 grammes per square metre. "Carton" is generally applied to still heavier weights, but it has not been possible to determine accurately the minimum weight for this class. "Cartulina" is broadly subdivided into "Cartulina Bristol" and "Cartulina Marfil" (ivory board). Since the date of the above figures conditions have again made Germany and Scandinavia the chief sources of supply of these lighter weights.

Among the "Carton" class, woodboard is chiefly supplied by Finland, leather board by Scandinavia, and strawboard by Holland. Cheap greyboard is made locally in large quantities and is used chiefly in the making of stamped or embossed trays in demand by restaurants and bars.

METHOD OF SALES

Paper board is not sold on the caliper system as in Canada. Bristol board is sold in packets of 100 sheets of 50 by 65 cms. each, and is quoted or ordered

by the number of kilos to 500 sheets. The weights are: 35, 40, 45, 50, 60, 80 and 120 kilos per 500 sheets. Imports are entered in cases of so many packets of 100 sheets each. The same system applies to ivory boards, also of 50 by 65 cm. size, except that the weights are 35, 40, 45, 50 and 60 kilos per 500 sheets.

Chipboard (grey), woodboard, strawboard and leatherboard, the "Carton" class, are all imported in sizes 70 by 100 cms. and classified as 4, 5, 6, 7, 8, 10, 12, 14, 16, 18, 20, 25, 30, 35 and 40 sheets per 10 kilos. Thus quotations and orders for these types are in terms of sheets per 10 kilos. Export bales are always 250 kilos in weight.

Large quantities of paperboard are imported from Scandinavia in October and November for the winter trade, and sold from stock at local prices irrespective of variations in the European market.

ECONOMIC CONDITIONS IN JAPAN

TRADE COMMISSIONER A. E. BRYAN

Yokohama, February 15, 1923.—Business this year got away to a good start about the middle of January. There is practically nothing done before this date owing to the fact that the New Year's season is one of long duration and is celebrated in a manner that cannot be appreciated by those who have never been in Japan.

While it is impossible to foresee any great increase in the volume of business to be done in Japan in 1923, yet there seems to be a more sober atmosphere and greater possibilities. The depression has already been in existence in varying degrees now for a period of three years, in spite of which Canada has been able gradually to increase her share in this country's trade. As far as Japan is concerned, the writer is of the opinion that no improvement is possible until prices come down to the same extent as in other countries.

Although considerable decreases have been noted in the prices of many commodities, the ratio is still over 100 per cent higher here than in pre-war days. The Government and the public generally are trying to readjust prices, but so far without success. Naturally as long as prices of food products stay high, labour cannot be expected to come down, and as a result the cost of Japanese products remains prohibitive, with the result that the country is losing much of its foreign business. Manufacturers here have a practice of reducing their output in order to maintain high prices in the home market; naturally this does not relieve the economic situation, for it also increases unemployment and adds to the country's difficulties in foreign markets.

Fortunately for Canada, exports from the Dominion to Japan consist not of the luxury class but are practically all essential to the everyday life of the nation. For this reason Canadian exporters may look forward with little concern and, rather than worry about the depressed financial situation, bear in mind that, besides her holdings at home, Japan still has over yen 600,000,000 gold specie held abroad, most of which is in New York and ready to help finance Japan's requirements from Canada.

JAPAN'S TRADE FOR JANUARY

The total foreign business of Japan for the first month of this year amounted to yen 245,000,000, of which imports took up yen 149,000,000 and exports the balance of yen 96,000,000, so that the country suffered an unfavourable balance of trade this month to the extent of yen 53,000,000. For the month of January, 1922, the trend was unfavourable but to the value of yen 91,000,000, so that Japan has really made a better beginning this year.

TARIFF CHANGES AND CUSTOMS REGULATIONS

United States Anti-dumping Act Applies to Certain Castings from Ontario

Advice has been received from Mr. M. M. Mahoney, representative at Washington of the Department of External Affairs of Canada, to the effect that No. 1 spuds malleable castings from Ontario have been made subject to anti-dumping duties in the United States. This is the result of a finding by the Secretary of the Treasury under Section 201 (A) of the United States Anti-Dumping Act of 1921. The finding, which is dated February 26, says: "After due investigation, I find that the industry of manufacturing castings in the United States is being or is likely to be injured, by reason of the importation into the United States of No. 1 spuds malleable castings imported from the Province of Ontario, Canada, and that such merchandise is sold or is likely to be sold in the United States at less than its fair value."

Prohibition of Shipments of Filled Milk in the United States

A copy of the United States Congress Bill No. 513, entitled "An act to prohibit the shipment of filled milk in interstate or foreign commerce," and which became law on the 4th instant, has been received from Mr. M. M. Mahoney, representative of the Department of External Affairs of Canada, Washington.

"The term 'filled milk' means any milk, cream, or skimmed milk, whether or not condensed, evaporated, concentrated, powdered, dried, or desiccated, to which has been added, or which has been blended or compounded with, any fat or oil other than milk fat, so that the resulting product is in imitation or semblance of milk, cream, or skimmed milk, whether or not condensed, evaporated, concentrated, powdered, dried, or desiccated. This definition shall not include any distinctive proprietary food compound not readily mistaken in taste for milk or cream or for evaporated, condensed, or powdered milk, or cream: *Provided*, That such compound (1) is prepared and designed for feeding infants and young children and customarily used on the order of a physician; (2) is packed in individual cans containing not more than sixteen and one-half ounces and bearing a label in bold type that the content is to be used only for said purpose; (3) is shipped in interstate or foreign commerce exclusively to physicians, wholesale and retail druggists, orphan asylums, child-welfare associations, hospitals, and similar institutions and generally disposed of by them."

As "filled milk" is defined, with certain reservations, as an adulterated article of food, the sale or traffic in this commodity is prohibited, and any person on conviction, under this law, will be subject to either a fine of not more than $1,000 or imprisonment for a period of not more than one year, or both.

United States Tariff Modified on Canadian Coal for Ship's Stores

Frederick H. Palmer, Assistant Canadian Trade Commissioner in the United States, under date of March 14, advises that Collectors of Customs were authorized on that date by the Treasury to admit free of duty Canadian coal imported for use as ship's stores on vessels clearing for ports out of the United States and for vessels clearing direct for the deep sea fisheries.

Action was taken by the Department upon the receipt of official information that coal imported into Canada may be withdrawn from warehouses free of duty under similar circumstances. Collectors were cautioned to satisfy themselves that Canadian coal so imported is necessary and intended for the purposes described in order to escape the payment of duty.

Consular Regulations on Shipments to Mexico

José Dámaso Fernández, Consul General of Mexico in Toronto, advises that consular regulations on shipments to Mexico have been amended as follows: "When the value of the commercial invoice is less than 10 pesos (Mexican currency) there are no fees; value being more than 10 pesos but less than 100 pesos, the fees are 2 pesos; when value is 100 pesos and over, the fees are 4 pesos. Although commercial invoices when the value is less than 10 pesos are exempt from fees, these invoices have to be viséd as usual. Consignors of merchandise who intend to ship goods to Mexico by parcel post must have the commercial invoice viséd by a Mexican consul in the same manner as if the goods were being shipped by freight. This commercial invoice is to be presented by the consignee in the office at which the clearance is made."

STEAMSHIP SERVICE BETWEEN THE RIVER PLATE AND CANADIAN PORTS

Mr. T. R. Furness, manager in Buenos Aires for the steamship lines of R. P. Houston and Company, writes that it is the intention of the company to inaugurate a northbound service from the River Plate to Canadian ports, commencing with the steamship *Hesperia*, which is to sail from Buenos Aires about the end of March.

REGULAR ALL-YEAR SAILINGS TO BE INAUGURATED BETWEEN CANADIAN PORTS AND SCANDINAVIA

Messrs. McLean Kennedy, Limited, Canadian agents for the Scandinavian-American Line, write under date March 19, 1923, that it is the intention of the Scandinavian-American Line to operate from Canadian ports the entire year, giving direct steamship service from Montreal in the summer and from West St. John in the winter. Arrangements have been made to begin with a monthly service and increase as the needs of the traffic warrant.

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain.	†*Majestic*	New York	March 31
" " "	*Regina*	Halifax	April 2
" " "	†*Minnekahda*	New York	" 5
" " "	*Montcalm*	St. John	" 6
" " "	–*Minnedosa*	"	" 7
" " "	†*President Harding*	New York	" 7
" " "	*Canada*	Halifax	" 8
" " "	–*Laconia*	"	" 9
" " "	†*Aquitania*	New York	" 10
" " "	†*President Polk*	"	" 11
" " "	*Montrose*	St. John	" 13
" " "	†*George Washington*	New York	" 14
Union of South Africa	**Jekri*	St. John	March 31
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela.	*Chignecto*	Halifax	April 13
Cuba, Jamaica and Colombia	**Andalusia*	"	March 28
" " "	**Ottar*	"	April 12
Bermuda, Bahamas, Jamaica, Colombia, British Honduras	*Canadian Fisher*	"	" 12
Bermuda, Barbados, Trinidad, British Guiana	**Montezuma*	St. John	" 7
China and Japan	*Empress of Australia*	Vancouver	" 5
" " "	*Empress of Asia*	"	" 19
Australia and New Zealand	*Niagara*	"	March 30

† Letter mail only. * Parcel post and specially addressed correspondence only.
– Papers, Parcel Post and specially addressed correspondence only.
Note.—The *Minnedosa* will be used for direct mail for the Continent including direct Parcel Post to France.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING MARCH 20, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement on the nominal closing quotations for all the principal exchanges for the week ending March 20, 1923. Those for the week ending March 13 are also given for the sake of comparison.

			Parity	Week ending March 13, 1923	Week ending March 20, 1923
Britain	£	1.00	$4.86	$4.7892	$4.7968
France	Fr.	1.	.193	.0626	.0665
Italy	Lire	1.	.193	.0491	.0496
Holland	Florin	1.	.402	.4030	.4039
Belgium	Fr.	1.	.193	.0547	.0576
Spain	Pes.	1.	.193	.1592	.1581
Portugal	Esc.	1.	1.08	.0445	.0460
Switzerland	Fr.	1.	.193	.1911	.1894
Germany	Mk.	1.	.238	.000044	.000049
Greece	Dr.	1.	.193	.0127	.0115
Norway	Kr.	1.	.268	.1887	.1865
Sweden	Kr.	1.	.268	.2708	.2728
Denmark	Kr.	1.	.268	.1988	.1968
Japan	Yen	1.	.498	.4920	.4960
India	R.	1.	2s.	.3255	.3247
United States	$	1.	$1.00	1.0171	1.0228
Mexico	$	1.	.498	.4984	.5024
Argentina	Pes.	1.	.424	.3814	.3797
Brazil	Mil.	1.	.324	.1169	.1150
Roumania	Lei	1.	.198	....	....
Jamaica	£	1.	4.86	4.7985	4.8187
British Guiana	$	1.	1.		
Barbados	$	1.	1.		
Trinidad	$	1.	1.		
Dominica	$	1.	1.		
Grenada	$	1.	1.	.9911-.9936	.9978-1.0029
St. Kitts	$	1.	1.		
St. Lucia	$	1.	1.		
St. Vincent	$	1.	1.		
Tobago	$	1.	1.		
Shanghai, China	Tael	1.	.708	.7501	.7862
Batavia, Java	Guilder	1.	.402	.3941	.3976
Singapore, Straits Settlements	$	1.	.567	.5619	.5676

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1409. Confectionery.—An importer of groceries and sundries in Tokyo, Japan, desires to hear from Canadian manufacturers of candy of all kinds, but particularly chocolate bars and cheaper grades of confectionery.

1410. Dried and Canned Fruits.—A Japanese provision merchant representing several well-known American and British firms in Japan would be glad to hear from Canadian manufacturers in a position to supply dried and canned fruits of all kinds. Samples and prices should be sent.

1411. Biscuits.—A firm in Tokyo, Japan, specializing in the import of food products, would be glad to hear from Canadian manufacturers of fancy biscuits similar to Huntley & Palmer's or American products. Prices and samples requested.

1412. Flour.—A firm of commission agents in Trinidad would like to obtain a connection for the sale of flour. To be put up in bags of 196 pounds and c.i.f. Trinidad quotation to be given. A large business can be guaranteed if brands and prices are right.

1413. Unrefined Sugar.—A large concern in Holland is desirous of getting into touch with Canadian manufacturers of unrefined Canadian sugar (type yellow pieces No. 4) with a view to importation. Terms, prices, etc.

1414. Cods, Haddocks, Oats and Flour, Wire Nails, etc.—A manufacturers' representative and commission agent in Port of Spain, Trinidad, would like to hear from Canadian exporters of cods and haddocks, wire nails and wire products, oats and flour.

1415. Food Products and Dried Fruit.—A commission agent of Antwerp, established eleven years, desires to represent Canadian firms exporting food products and dried fruits.

1416. Store Cattle.—A Hull firm desire to arrange for the purchase of store cattle, or to handle on commission.

1417. Canned Crab.—A London firm would be glad to receive samples and prices from Canadian packers of canned crab.

Miscellaneous

1418. Metal Picture Frames.—A Japanese firm desire to receive prices and catalogues, or samples, of Canadian metal picture frames, for which there is quite a demand in Japan.

1419. Pencils.—A Japanese importer in Tokyo desires to receive samples and prices of Canadian pencils of all kinds with a view to entering business relations.

1420. Writing Paper and Envelopes.—An import house located in Tokyo, and specializing in stationery products, would be glad to receive quotations and samples of Canadian envelopes and writing paper.

1421. Toys.—A Japanese broker and retailer would be glad to hear from any Canadian manufacturer of toy specialties, wood or steel, with a view to business.

1422. Sulphate of Ammonia.—An important London firm would be glad to get into touch with Canadian manufacturers of sulphate of ammonia who can ship regularly to the West Indies.

1423. Cobalt Oxide, Grey or Black.—A commission firm interested in the import of chemicals desire to receive samples and prices from Canadian manufacturers of grey and black cobalt oxide. This firm have been buying their supplies in the past from the United States.

1424. Sundries.—A manufacturers' representative in Mexico City desires to secure agencies for Canadian manufacturers of glassware, cheap jewellery, hardware, and notions.

1425. Barium Sulphate.—A large wholesale import and export druggist house in Tokyo desires to receive samples and prices of barium sulphate 90 per cent. If prices and quality are competitive, will place order for from 20 to 30 tons right away.

1426. Cash Registers.—A commission firm in Tokyo are interested in representing a good manufacturer of cash registers and would be glad to hear from such, with catalogues and prices.

1427. Calculating Machines.—A leading wholesale and retail firm in Tokyo are interested in the import of calculating machines and desire to receive samples, quotations, and catalogues.

1428. Gas Pipe.—A Japanese importer in Osaka would be glad to receive catalogues from Canadian manufacturers of gas pipe. Price lists, discounts, and other information are requested.

1429. Asbestos Yarn Packing.—A Japanese import and export commission firm desire to receive samples and prices of Canadian asbestos packing.

1430. Dental Goods.—A firm specializing on the import of dental supplies and accessories of all kinds desire to hear from a Canadian manufacturer in a position to take care of such requirements. Catalogues, prices, etc., are requested.

1431. General Agency.—A manufacturers' representative and general commission merchant in Belize, British Honduras, desires communications with Canadian exporters of granulated sugar, canned fish, and sail duck.

1432. Raw Wool and Wool of All Kinds.—A French firm wish to be put in direct touch with Canadian exporters of the above goods situated at Ottawa, Quebec, Toronto, Halifax, etc.

1433. Balsam.—A Japanese wholesaler, import and export merchant, specializing in druggists' supplies, desires to hear from Canadian exporters of balsam, which he has been receiving heretofore through the medium of American brokers, but understands originates in Canada.

1434. Lambswool Skins.—A London manufacturing firm who are large buyers of lambswool skins invite offers from Canadian manufacturers.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From St. John

To London.—Lord Dufferin, I.C. Transports, Ltd., March 25; Canadian Commander, Canadian Government Merchant Marine, March 28; Bredon, Canadian Pacific Steamships, Ltd., April 5; Canadian Leader, Canadian Government Merchant Marine, April 7.

To London (via Halifax).—Lexington, Furness Line, April 24.

To Manchester (via Halifax).—Manchester Brigade, Manchester Line, March 31; Manchester Producer, Manchester Line, April 14; Manchester Corporation, Manchester Line, April 26.

To Liverpool.—Marloch, Canadian Pacific Steamships, Ltd., March 30; Canadian Mariner, Canadian Government Merchant Marine, March 29; Montcalm, Canadian Pacific Steamships, Ltd., April 6; Montrose, Canadian Pacific Steamships, Ltd., April 13.

To Cardiff and Swansea.—Canadian Otter, Canadian Government Merchant Marine, March 28.

To Glasgow.—Metagama, Canadian Pacific Steamships, Ltd., March 29; Canadian Voyageur, Canadian Government Merchant Marine, April 7; Marburn, Canadian Pacific Steamships, Ltd., April 19.

To Hull (via Halifax).—Lexington, Furness Line, April 12; Ariano, Furness Line, April 24.

To Southampton.—Minnedosa, Canadian Pacific Steamships, Ltd., April 7.

To Belfast, Londonderry and Cork.—Dunaff Head, Head Line, April 10.

To Dublin, Londonderry and Cork.—Lord Antrim, Head Line, March 25; Dunaff Head, Head Line, April 10.

To Antwerp.—Minnedosa, Canadian Pacific Steamships, Ltd., April 7; Bosworth, Canadian Pacific Steamships, Ltd., April 18.

To Rotterdam.—Lord Dufferin, I.C. Transports, Ltd., March 25; Hastings County, I.C. Transports, Ltd., April 21.

To Havana.—A steamer, Nagle & Wigmore, March 30, April 15.

To Bermuda, Barbados, Trinidad and Demerara.—Berwyn, Canadian Pacific Steamships, Ltd., April 7.

To Hamburg.—Lisgar County, I.C. Transports, Ltd., March 31; Brant County, I.C. Transports, Ltd., April 11; Welland County, I.C. Transports, Ltd., April 23.

To Havre and Hamburg.—Lisgar County, I.C. Transports, Ltd., March 31; Brant County, I.C. Transports, Ltd., April 11; Welland County, I.C. Transports, Ltd., April 23.

To Bordeaux and Dunkirk.—Grey County, I.C. Transports, Ltd., March 31.

To Australia and New Zealand.—Atholl, New Zealand Shipping Co., April 25.

To South Africa.—Jekri, Elder, Dempster & Co., March 31.

To Rio de Janeiro, Santos, Montevideo and Buenos Aires.—Halizones, Houston Line, April 8.

From North Sydney

To St. John's (Nfld.).—Kyle, Reid-Newfoundland Co., Tuesday, Thursday and Saturday every week.

From Halifax

To Liverpool and Queenstown.—Regina, White Star-Dominion Line, April 2; Canada, White Star-Dominion Line, April 8; Laconia, Cunard-Anchor-Donaldson Line, April 9.

To Plymouth, Cherbourg and London.—Ausonia, Cunard-Anchor-Donaldson Line, April 5; Antonio, Cunard-Anchor-Donaldson Line, April 23.

To Bermuda, British West Indies, and British Guiana.—Royal Mail Steam Packet Co., April 13 and 30, and every fortnight thereafter.

To Glasgow.—Saturnia, Cunard-Anchor-Donaldson Line, April 6; Cassandra, Cunard-Anchor-Donaldson Line, April 16.

To St. John's (Nfld.).—Sable I., Farquhar Co., Ltd., March 29; Canadian Sapper, Canadian Government Merchant Marine, March 29; Belvernon, Tri-National SS. Corporation, April 3.

From Vancouver

To YOKOHAMA, KOBE, MOJI, SHANGHAI, MANILA AND HONG KONG.—Hawaii Maru, Osaka Shosen Kaisha, April 4; President Grant, Admiral Oriental Line, April 8; Alabama Maru, Osaka Shosen Kaisha, April 19.

To YOKOHAMA, KOBE, NAGASAKI, SHANGHAI, MANILA AND HONG KONG.—Hawaii Maru, Osaka Shosen Kaisha, April 4.

To YOKOHAMA, KOBE, SHANGHAI AND HONG KONG.—Empress of Asia, Canadian Pacific Steamships, Ltd., April 19.

To YOKOHAMA AND KOBE.—Toyama Maru, Nippon Yusen Kaisha, April 4; Alabama Maru, Osaka Shosen Kaisha, April 19; Hakata Maru, Nippon Yusen Kaisha, April 28.

To YOKOHAMA, KOBE, HONG KONG AND MANILA.—Achilles, Blue Funnel Line, April 7; Philoctetes, Blue Funnel Line, April 28.

To YOKOHAMA, KOBE, SHANGHAI, MANILA AND HONG KONG.—Stuart Dollar, Canadian Robert Dollar Co., April 15.

To DAIREN (MANCHURIA).—Hawaii Maru, Osaka Shosen Kaisha, April 4; Alabama Maru, Osaka Shosen Kaisha, April 19.

To HONOLULU, SUVA, AUCKLAND, AND SYDNEY.—Niagara, Canadian-Australasian Royal Mail Line, March 30; Makura, Canadian-Australasian Line, April 27.

To SHANGHAI, MANILA, HONG KONG AND SINGAPORE.—Harold Dollar, Canadian Robert Dollar Co., April 5.

To WELLINGTON, LYTTLETON, DUNEDIN, MELBOURNE AND SYDNEY.—Wairuna, Canadian-Australasian Royal Mail Line, April 2.

To LONDON AND LIVERPOOL.—Astronomer, Harrison Direct Line, April 15.

To BORDEAUX, HAVRE, ANTWERP, SANTANDER (SPAIN) AND LONDON.—Bordeaux, March 25.

From Victoria

To LONDON AND LIVERPOOL.—Astronomer, Harrison Direct Line, April 13.

To YOKOHAMA, KOBE, SHANGHAI, MANILA AND HONG KONG.—President Jefferson, Admiral Oriental Line, March 27; President Grant, Admiral Oriental Line, April 8; President Madison, Admiral Oriental Line, April 20.

To YOKOHAMA, KOBE, NAGASAKI, SHANGHAI AND HONG KONG.—Iyo Maru, Nippon Yusen Kaisha, April 14.

ELECTRICAL SUPPLIES TRADE IN CHINA

The electrical supplies trade in China is to-day worth catering for, says *Kelly's Monthly Trade Review*, having expanded immensely since 1900, when the total imports were scarcely worth more than £600, to a total value of 10½ million dollars in 1921, to which figure Great Britain participated by 25 per cent, Japan 23 per cent, and the United States 34 per cent. It is being pointed out that there are, practically speaking, no limits to the expansion in this trade in China, only would-be sellers must demonstrate personally and on the spot what they have to offer, as the Chinese will certainly no longer place orders on the strength of a catalogue—a statement the truth of which was quite recently proved, when a German representing the well-known General Electric Co. at Berlin, in spite of higher prices asked than offered by some catalogue competitors, succeeded in placing large orders in almost every town visited, as he could demonstrate his goods. Shanghai is the place, of course, for agencies; and if these are properly worked, considerable success may be reckoned with. Just now there is an opportunity in the Nanking district, where very many houses are being electrified. It is a thickly-populated district, with nearly 60,000,000 inhabitants and very many large towns, so far entirely without any electric light or power. There are already fifteen central stations operating in the district, all of which, we are told are overloaded.

LIST OF ACTS ADMINISTERED AND PUBLICATIONS ISSUED BY THE DEPARTMENT OF TRADE AND COMMERCE

Copyrights Act (a). Cullers Act. Electricity and Fluid Exportation Act (b). Electricity Inspection Act (b). Electric Units Act (b). Gas Inspection Act (b). Gold and Silver Marking Act. Grain Act. Inspection and Sale Act. Inspection of Water Meters Act (d). Lead Bounties Act. Patent Act (a). Petroleum Bounty Act. Statistics Act (c). Trade Mark and Design Act (a). Timber Marking Act (a). Weights and Measures Inspection Act (d). Zinc Bounties Act.

MISCELLANEOUS

Annual Report of the Department of Trade and Commerce.
Annual Report of Board of Grain Commissioners for Canada.
Annual Report *re* **Mail Subsidies and Steamship Subvention.**
List of Licensed Elevators, etc.
Patent Office Record (Weekly) (a).
Annual Report of Weights and Measures, Electricity and Gas (d).
Dominion Grain Research Laboratory (1920).
Grain Inspection in Canada (1914).
Rules and Forms of the Canadian Patent Office (a).
Rules and Regulations made by the Board of Grain Commissioners.
Trial Shipments of Wheat from Vancouver via the Panama Canal to the United Kingdom (1918). (Out of print).

PUBLICATIONS OF THE COMMERCIAL INTELLIGENCE SERVICE (e).

Commercial Intelligence Journal, containing Reports of Trade Commissioners and other Commercial Information.
Apple Market Conditions: Reports from the Canadian Fruit Trade Commissioner at Liverpool (periodically).
Canada-West Indies Conference (1920).
Canadian Economic Commission to Siberia (1919).
Fruit Production in Australia (1922).
German War and Its Relation to Canadian Trade (1914).
Indian Empire as a Market for Canadian Products (1922). (Price outside Canada, 35 cents.)
Mexico as a Field for Exports (1921). (Price outside Canada, 35 cents.)
Markets of Jamaica and the Republic of Colombia, Venezuela, and Panama (1922). (Price outside Canada, 35 cents).
Packing for Overseas Markets (1922). (Price outside Canada, 35 cents.)
Report of Special Trade Commission to Great Britain, France and Italy. (French and English) (1916).
Russian Trade (1916).
Tariffs of the British West Indies (in leaflets).
Trade after the War (1916).
Timber Import Trade of Australia (1917).
Trade between Canada and the British West India Colonies (1920).
Trade of the New Countries of South-east Europe (1921). (Price outside Canada, 35 cents.)
Trading Opportunities in Scandinavia (1922). (Price outside Canada, 35 cents.)
Trading with Egypt (1921). (Price outside Canada, 35 cents.)
Trade with Greece (1921).
Trade with South China (1918).
Trading with Spain (1920).
Trading with Switzerland (1922). (Price outside Canada, 35 cents.)
Toy Making in Canada (1916).
West Africa and Its Opportunities for Canadian Trade (1921). (Price outside Canada, 35 cents.)

PUBLICATIONS OF THE BUREAU OF STATISTICS

The following is an abbreviated list of publications of the Bureau of Statistics. For a complete list, see note (c).
Census of Canada (1911). VI Vols., Bulletins, etc.
Census of Prairie Provinces (1916).
Miscellaneous Statistics respecting the following: Criminal; Education; Finance (Provincial and Municipal); Transportation, including railways and tramways, express, telegraphs, telephones, water, etc.; Production, including agriculture, furs, fisheries, forestry, mining and manufactures; Vital (annual and monthly).
Year Book of Canada.
Report of the Dominion Statistician, Annual.
Trade of Canada (Imports and Exports), Annual and Monthly.
Trade (Internal), including grain, livestock, coal, prices, etc.

NOTE.—(a) Applications should be addressed to: Commissioner of Patents, Ottawa. (b) Applications should be addressed to Director Gas and Electricity Inspection Service, Ottawa. (c) Applications should be addressed to: Dominion Statistician, Ottawa. (d) Applications should be addressed to: Director Weights and Measures Service, Ottawa. (e) Applications should be addressed to the Director, Commercial Intelligence Service, Ottawa.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 285 Beaver Hall Hill, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic.

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address, Canadian.*

Australia.

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium.

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil.

E. L. McColl. Address for letters—Caixa Postal 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies.

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China.

J. W. Ross. Address for letters—P.O. Box 300. Office—Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba.

Address: 400 and 401 Teniente Rey 11, Havana. (Post-office Box 1290.) *Cable Address, Cantracom.*

France.

Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany.

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.

Holland.

Norman D. Johnston, Zuidblaak 26, Rotterdam. *Cable Address, Watermill.*

India and Ceylon.

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy.

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica.

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan.

A. E. Bryan, P.O Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico.

C. Noel Wilde. Address for letters, Apartado Num. 126 bis, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian.*

New Zealand.

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa.

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements.

P. W. Ward, P.O. Box 121, Singapore. (Territory covers Straits Settlements, British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

A. B. Muddiman, Sun Building, Clare Street, Bristol. *Cable Address, Canadian.*

Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States.

Frederic Hudd, 44 Whitehall Street, New York City. *Cable Address, Cantracom.*

CANADIAN COMMERCIAL AGENTS

Australia.

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark.

C. E. Sontum, Grubbegd, No. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies.

R. H. Curry, Nassau, Bahamas.

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

Vol. XXVIII March 31, 1923 No. 1000

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

Printed by F. A. ACLAND, Printer to the King's Most Excellent Majesty

TABLE OF CONTENTS

Commercial Intelligence Journal

Issued Every Saturday by the Department of Trade and Commerce

Ottawa **March 31, 1923.** **No. 1000**

LOOKING BACKWARD

With the present number this publication has completed one thousand issues, and it has been suggested that in turning this milestone it might not be amiss to say something of the circumstances which led to its founding.

Early in 1904 the Department was—and had been since its formation—operating with a scanty staff and as a consequence was beset with difficulties on every hand. The comparatively few Trade Commissioners and Commercial Agents then serving Canada abroad were perforce writing their reports without much direction, control, or assistance from headquarters, and their unguided efforts, with one or two notable exceptions, were of little value in serving the practical needs of Canadian manufacturers and exporters. Statistics of rainfall and descriptions of sunsets were not infrequently sent in, and matter relating to the possibilities for the extension of Canadian export trade in overseas markets was couched in too general terms. These documents were published only once every three months in the quarterly report of the Department. Hence, interred for a time among a mass of other unrelated matter, they were not in the hands of exporters until some months after they had reached Canada; and time being one of the elements of value in the pursuit of foreign trade, they were naturally of little use for the purpose they were intended to serve. It was not surprising therefore that criticism rained in on the Department from all sides, and the writer well remembers the day when this became so intense that the late Sir Richard Cartwright, then Minister of Trade and Commerce, called him (at that time Private Secretary to the Minister) into his office and asked him what the Canadian manufacturers wanted. The reply was given in one word, "Information." The Minister then inquired how this could be furnished. "By issuing a weekly trade report." "When can you start publication?" "Next week," was the reply.

Accordingly the following week the first issue, dated February 1, 1904, made its appearance under the title *Weekly Report*—a title that was changed in 1915 to the *Weekly Bulletin,* and again in 1922 to that which it now bears, the *Commercial Intelligence Journal.* There were few reports available in the early days; and partly in order to bulk it into a dignified size, and partly in the hope that in this form newspapers throughout the Dominion might the readier be induced to clip and reproduce its contents, the publication was first printed on one side of the paper only. Commercial information from various quarters was added, but as the Press did not think our early efforts of sufficient importance for reproduction, it was early decided to print on both sides of the

paper. It not infrequently happened that the writer, and others who succeeded him in the work of editing, found themselves in great difficulty in obtaining sufficient material to make up a sizeable issue. This was very different from the situation at the present day, when with a larger number of Trade Commissioners in the field, the task of the editor is not so much to obtain sufficient matter for the publication, as by selection and condensation from the large number of manuscripts submitted, to confine the information printed to what is thought to be of definite value rather than in burying useful trade intelligence in an unwieldy publication two or three times the size of the present *Commercial Intelligence Journal*.

During the years that this publication has been before the Canadian public, it is unnecessary to say that it has passed through many trials and been the object of many criticisms, but there is consolation in the fact that owing to the improvements which from time to time have taken place, criticisms have ceased and generous commendations have taken their place.

The Department has reason to believe that the information now contained in this journal is appreciated by Canadian manufacturers and exporters, and will always endeavour to increase its usefulness, and to that end welcomes constructive criticism from its readers.

F. C. T. O'HARA,
Deputy Minister.

SUMMARY OF THE TRADE OF CANADA FOR FEBRUARY, 1923

The summary of the trade of Canada for February, 1923, shows that, as represented in dollars, imports for consumption were valued at $65,307,696 in February, 1923, as against $54,294,255 in February, 1922, and $71,970,507 in February, 1921. The imports from the United Kingdom in February, 1923, were valued at $11,760,154, as against $9,423,629 in February, 1922, and $11,750,970 in February, 1921. The imports from the United States in February, 1923, were valued at $44,272,637, as against $37,043,290 in February, 1922, and $49,086,236 in February, 1921. The total imports for the twelve months ending February, 1923, were valued at $789,962,342 as against $761,026,261 for the corresponding period in 1921-22, and $1,290,067,546 for the twelve months ending January, 1921.

The value of the exports of Canadian produce for the month of February, 1923, was $57,656,161, as against $46,046,449 for February, 1922, and $65,237,738 for February, 1921. The exports to the United Kingdom were valued at $17,874,260 in February, 1923, as compared with $15,316,265 in February, 1922, and $18,564,067 in February, 1921. The exports to the United States were valued at $26,719,205 during February, 1923, as against $20,116,356 in February, 1922, and $32,495,002 in the corresponding month of 1921. The value of the total exports of Canadian produce during the twelve months ending February, 1923, was $914,433,157, as against $748,793,795 for the corresponding period in 1921-22, and $1,214,204,132 for the twelve months ending February, 1921. The month's returns show an unfavourable balance of trade of $7,651,535; the returns for the twelve months' period show a favourable balance of $124,470,815.

ARY OF THE TRADE OF CANADA: MONTH, ELEVEN MONTHS AND TWELVE MONTHS ENDING FEBRUARY, 1923

(Compiled by External Trade Branch, Dominion Bureau of Statistics)

Main Groups	Month of February, 1923			Eleven Months ending February, 1923			Twelve Months ending February, 1923		
	Total Imports	From United Kingdom	From United States	Total Imports	From United Kingdom	From United States	Total Imports	From United Kingdom	From United States
Imports for Consumption	$	$	$	$	$	$	$	$	$
Agricultural and Vegetable Products	11,725,717	1,591,658	5,563,206	143,445,275	24,037,320	64,780,312	159,615,023	26,462,114	74,258,403
Animal Products	3,521,703	189,717	2,670,689	41,024,368	2,614,580	30,706,479	46,427,306	3,117,762	34,692,286
Fibres and Textile Products	16,520,051	6,924,869	7,248,311	149,684,814	60,723,373	68,260,773	168,389,776	68,574,556	76,528,221
Wood, Wood Products and Paper	2,610,672	139,797	2,380,477	32,056,268	2,452,357	28,470,646	35,671,924	2,767,509	31,642,089
Iron and its Products	10,938,664	1,050,214	9,743,329	121,892,073	11,485,934	108,844,817	134,162,442	12,643,934	119,871,960
Non-Ferrous Metal Products	2,858,834	261,643	2,408,497	33,348,646	3,130,972	28,319,770	36,684,486	3,396,792	31,267,306
Non-Metallic Mineral Products	12,615,479	1,024,219	10,839,571	124,215,050	11,841,762	100,438,234	136,954,530	12,401,008	111,169,288
Chemicals and Allied Products	1,705,601	183,931	1,310,072	22,883,776	3,279,401	16,204,141	25,691,044	3,686,775	18,286,714
All other Commodities	2,810,975	394,106	2,108,485	42,033,346	6,402,641	31,664,339	46,365,811	7,084,588	34,884,650
Total Imports, 1923	65,307,696	11,760,154	44,272,637	710,583,616	125,968,340	477,689,511	789,962,342	140,135,038	532,600,917
1922	54,294,255	9,423,629	37,043,290	668,425,606	102,968,645	461,046,790	761,026,261	119,376,345	524,822,582
1921	71,970,507	11,750,970	49,086,236	1,147,558,227	197,565,862	792,401,028	1,290,067,546	223,026,178	886,958,29
	Total Exports	To United Kingdom	To United States	Total Exports	To United Kingdom	To United States	Total Exports	To United Kingdom	To United States
Exports (Canadian Produce)									
Agricultural and Vegetable Products	18,817,910	10,848,435	1,668,441	385,095,154	258,510,968	39,932,059	406,306,105	271,699,518	41,674,481
Animal Products	8,473,326	3,544,350	3,888,984	126,922,203	61,507,923	50,872,855	136,255,761	65,544,528	55,019,090
Fibres and Textile Products	422,609	63,394	210,332	6,946,047	988,792	3,813,034	7,393,333	1,095,368	3,985,454
Wood, Wood Products and Paper	16,869,580	606,162	14,803,517	204,060,392	18,986,319	169,219,242	221,592,194	19,867,410	183,926,247
Iron and its Products	5,378,239	1,633,063	931,771	44,032,147	10,450,468	7,955,804	47,598,059	11,252,280	8,530,499
Non-Ferrous Metal Products	3,429,250	454,483	2,352,885	38,763,470	7,473,900	24,067,883	41,853,514	8,010,609	25,640,651
Non-Metallic Mineral Products	2,089,057	43,416	1,787,644	24,009,993	542,550	17,988,245	26,017,021	646,066	19,375,650
Chemicals and Allied Products	1,258,861	212,000	670,951	12,226,169	1,713,967	6,945,548	13,408,414	1,855,172	7,676,119
All other Commodities	917,329	468,957	404,680	12,838,269	1,979,406	9,356,630	14,008,756	2,127,525	10,067,050
Total Exports, 1923	57,656,161	17,874,260	26,719,205	854,893,844	362,154,293	330,151,300	914,433,157	382,098,476	355,895,241
1922	46,046,449	15,316,265	20,116,356	680,701,367	279,417,492	266,844,702	748,793,795	293,666,295	301,917,149
1921	65,237,738	18,564,067	32,495,002	1,121,071,273	298,596,068	507,250,520	1,214,204,132	322,565,041	551,696,737
Exports (Foreign Produce)									
Totals, 1923	990,151	148,871	663,773	12,615,318	781,370	10,267,317	13,923,499	841,436	11,344,097
1922	958,024	127,408	671,500	12,378,148	941,452	10,438,754	13,753,595	996,610	11,555,392
1921	1,077,452	85,538	921,532	19,888,971	1,328,642	17,262,331	24,975,121	1,422,225	22,086,488

TRADE COMMISSIONER B. S. WEBB'S ITINERARY IN CANADA

Mr. B. S. Webb, Canadian Trade Commissioner in Buenos Aires, is now in Canada and has begun his business tour throughout the Dominion. The first part of his itinerary is as follows:—

Vancouver and Victoria	March 29 to April 3
Winnipeg	April 9
Toronto	April 12 to 20
Owen Sound	April 23
Guelph	April 25
Kitchener	April 26
Stratford	April 27
Sarnia	April 28
Windsor	April 30 to May 1
London	May 2
Woodstock	May 3
Brantford	May 4
Galt	May 5
Niagara Falls	May 7
Welland and St. Catharines	May 8 to 10
Hamilton	May 11 to 15

The second part of Mr. Webb's itinerary will be published later.

Firms in Toronto and Winnipeg who desire to be brought in touch with Mr. Webb or to interview him should direct their communications to him care of the Canadian Manufacturers' Association or the Secretary of the Board of Trade in these cities, and in the case of Hamilton to the Secretary of the Chamber of Commerce in that city. In all other cities and towns included in the itinerary requests for interviews should be addressed to the Secretary of the local Chamber of Commerce or Board of Trade.

LEGISLATION IN UNITED KINGDOM REGARDING QUALITY AND MARKING OF FOOD PRODUCTS

Mr. Harrison Watson, Canadian Trade Commissioner in London, writes under date March 15, 1923, that a feature of more than passing interest to Canada is the tendency for the British Government to adopt legislation with the object of fixing food standards, the prevention of adulteration of foodstuffs, and in similar directions. Although measures of this kind have been in force in Canada and certain other countries for some time past, such restrictions have been practically non-existent in this country.

Details of the condensed milk regulations which come into force from the 1st August, 1923, have already been published in the *Commercial Intelligence Journal* [No. 997, March 10, 1923], and a private member's bill is being introduced into the House of Commons this week with the object of enforcing the marking of agricultural produce generally, either with the word "Imported" or the name of the country of origin. While the fate of this bill is uncertain, the Government announces that it is proposed shortly to introduce a Bill amending the Merchandise Marks Act upon the lines of the report made by the special Committee which inquired into the working of the present Act some time ago. If these suggestions are adopted there is a probability of marking with the country of origin being enforced in other directions.

UNITED KINGDOM TRADE CONDITIONS

Trade Commissioner Harrison Watson

London, March 15, 1923.—The tendency for wholesale prices in this country to rise began in October last, and possibly the most noticeable feature of the past month has been the acceleration of this movement. While there has been some fluctuation in food values, the new advance is entirely due to materials; indeed food prices have recently fallen somewhat; and as the chief causes of the increase are iron, steel, and coal, the movement is clearly traceable to the occupation of the Ruhr and the consequent disorganization of German industries. Outside of this the rise in the price of raw cotton has been a contributory factor.

According to the price index compiled by the London *Times*, the percentage increase over July, 1913, of food and raw materials combined, which was 55·6 in September, had by the end of February reached 62.

The recovery in production of the United Kingdom iron and steel industries, as has been reported from time to time, commenced some months ago, and has certainly received impetus from the Ruhr situation, because this has had the direct effect of removing the competition of both France and Germany, and partly Belgium, from the world's markets, and the diversion of considerable business to this country. According to figures just issued by the National Federation of Iron and Steel Manufacturers, the quantity of steel ingots and castings produced in the United Kingdom in February, 1923, amounted to 707,100 tons—the highest since 1920, when the monthly average was 755,600 tons, and in excess of 1913 when the average was 638,600 tons.

Unfortunately, however, the Ruhr position is adversely affecting the output of pig-iron, which totalled 543,400 tons in February against a pre-war average monthly output of 855,000 tons, the reason being the short supplies and high price of coke and the abnormal export demand for coal.

This situation is indeed causing considerable embarrassment to British ironmasters and seriously discounting benefits which would otherwise have accrued to them, and for this reason, while the number of furnaces in operation has still further been increased. the number in blast at the end of January was only 189, in comparison with the maximum of 338 in 1913. The hesitation of ironmasters is further increased by the knowledge that the increase in prices which has already taken place is curtailing orders, and the uncertainty regarding what is going to take place in the Ruhr, because a settlement would almost surely be succeeded by a heavy drop in values.

Otherwise the past few weeks have witnessed practically no alteration in the general trade position. The impression generally prevails that home trade is slowly looking up, but according to the monthly reviews of trade and industry which are made by a number of authorities, conditions of prosperity still vary greatly in different branches.

The February returns of foreign trade also indicate little deviation from the uniformity of the past few months, because while in comparison with January there is a reduction of approximately £16,000,000 in the value of imports, and £9,000,000 in total exports, when allowance is made for the extra three days in January, the daily average is nearly the same, except that there is a slight falling-off in exports. In comparison, however, with February, 1922, imports increased by £14,000,000, but British exports dropped by rather over £1,000,000. While the results are fairly satisfactory, when the present disorganized state of affairs on the continent is taken into consideration, it must be borne in mind that the extremely heavy export of coal somewhat saves the situation.

CANADIAN STORE CATTLE TRADE IN ENGLAND

Mr. Harrison Watson, Canadian Trade Commissioner in London, writing under date March 15, 1923, states that now that the date of the lifting of the cattle embargo approaches, cattle importers and dealers in Great Britain are awaiting with interest the nature of the arrangements which are being made in Canada for conducting the trade, and the London office is receiving numerous inquires both as regards these and for the addresses of Canadian organizations and firms who are prepared to engage in the shipment of store cattle in order that they may negotiate for supplies. Public authorities, transportation companies and others who would be affected by the development of the trade are also watching the course of events.

The cost of ocean transportation is likely to be a vital factor in the establishment of any considerable business, but at the present time it is reported that there is a brisk demand for young live cattle and that good prices are being realized.

A NEW AUSTRALIAN FRUIT CASE

C. Hartlett, Office of the Trade Commissioner

Melbourne, February 19, 1923.—A new export case, the invention of an Australian in close touch for many years with the fruit business, is being tried in a shipment of 500 cases of apples now going forward from Melbourne to London.

The case is known as the " air free " case, and it is claimed will solve in a simple manner the problems of ventilation and bruising to which exporters of fruit have hitherto had to give much thought and attention.

In construction the case resembles the ordinary standard case except that the sides consist of three slats, the top and bottom slats being twice as thick as the middle one. It is claimed that the effects of this simple expedient are threefold. In the first place, the difference in the thicknesses makes a groove running the length of the case, along which, when the fruit is stacked, air can pass so freely that the use of " dunnage " between the tiers of the stack is rendered unnecessary and much time and labour saved. Further, the thickness of the slats which help to form the corners gives such strength at the corners that there is claimed to be no possibility of the case breaking open, or of strain bruising the fruit inside. The cost of the case is said not to exceed by more than one penny (2 cents) the cost of the ordinary locally-made fruit case now used for export.

If the advantages claimed for the new case are proved in the experimental shipment, it is anticipated that it will be largely used in future consignments from Australia.

AUSTRALIAN APPLE DISEASE

C. Hartlett, Office of the Trade Commissioner

Melbourne, February 19, 1923.—With the object of investigating the conditions of storage and transport of Australian apples to the United Kingdom, a party of four scientists has recently arrived in Australia.

The party has been selected by the British Food Investigation Board in co-operation with shippers and growers, and will concentrate most of their attention on one disease—" brown heart " in apples—the prevalence of which in last season's exports seriously prejudiced the reputation of Australian apples in the English markets. The fruit subject to the disease appeared to be quite firm and was sold as first-class quality, but when opened the inside was found to be brown, soft and flavourless.

The disease is practically a new one as far as Australian apples are concerned, having previously been known only in pears and bananas. The cause is unknown, though it is believed to originate in an excess of carbon dioxide in the cool chambers of some of the transporting vessels, particularly in those in which proper attention has not been paid to ventilation.

The British party has brought with it special testing instruments for the registration of the temperature, humidity and the carbonic acid gas in ships' holds, and will make a thorough inspection of apple-growing districts, methods of packing, cold storage installations at shipping points and all other factors having the slightest bearing on the object of their visit.

The existence of the disease is a menace to the Australian apple export trade, as apart from the prejudice created in the minds of buyers, which will take years to overcome, the loss last season to shippers and growers is reported to have amounted to over £250,000.

TOBACCO SETTLERS FOR AUSTRALIA

C. Hartlett, Office of the Trade Commissioner

Melbourne, February 19, 1923.—A Victorian Government tobacco expert is shortly to visit the United States to arrange for the settlement in the State of Victoria of a number of families from tobacco areas who are thoroughly versed in the growth and curing of tobacco leaf. These families are to be settled in tobacco-growing districts under arrangements to be made by the Government, in order that their methods of culture may be followed by growers now engaged in the industry who have not had the advantage of experience under recognized conditions such as prevail in other tobacco-growing countries.

Although the industry is not a new one in Victoria, it is only within recent years that particular attention has been paid to it or that the possibilities of development have been recognized. Hitherto the ravages of " blue mould " in the leaf have retarded progress, but it is hoped that experiments now being undertaken, in a laboratory established by the Government for the purpose of thoroughly investigating the disease, will discover some means of prevention.

This season over 1,200 acres are under tobacco cultivation, but a much larger area would have been cultivated had sufficient plants been available. A number of large manufacturing establishments, at present obtaining leaf from abroad, afford a ready market for the local product at satisfactory prices to the growers.

AUSTRALIAN TRADE RETURNS

C. Hartlett, Office of the Trade Commissioner

Melbourne, February 19, 1923.—Recently issued figures of Australian overseas trade for the first six months—July to December—of the present financial year ending on June 30, 1923, show the large increase of £21,253,251 in the value of imports in comparison with the corresponding period of the previous year. Exports increased by only £62,383. The total imports for the period amounted in value to £65,649,296, and the exports to £58,030,224, leaving a trading balance against the Commonwealth of £7,619,072.

The large increase in the imports is mainly due to the removal of banking restrictions in affording oversea credits imposed in the previous year as a protective measure against the further accumulation of funds in London. Consequently imports for a time were restricted more or less to necessary commodi-

ties only, and the exchange position improved to such an extent that heavy replacement of stocks took place in the six months under review. This was particularly marked in apparel, piece-goods, etc., the imports of which increased by £11,657,125, motor chassis increased by £1,456,890, while lumber, paper, hardware, machinery, rubber goods, and chemicals also came forward in larger volume.

The values of the Australian imports and exports, under general classifications, during the first six months of the fiscal years 1920-21 and 1921-22 are appended for comparative purposes.

AUSTRALIAN IMPORTS

	July to Dec., 1921	July to Dec., 1922
Foodstuffs of Animal Origin	£ 663,753	£ 724,157
Foodstuffs of Vegetable Origin	2,222,853	2,869,308
Spirituous and Alcoholic Liquors	710,561	906,001
Tobacco and Preparations thereof	894,857	784,073
Live Animals	40,697	38,282
Animal Substances, not Foodstuffs	343,859	439,046
Vegetable Substances and Fibres	1,542,424	1,414,927
Apparel, Textiles, etc	13,583,294	25,240,419
Oils, Fats and Waxes	2,494,378	2,825,730
Paints and Varnishes	194,439	249,194
Stones and Minerals, Ores, etc	90,920	145,176
Metals, Machinery, etc	12,374,434	15,715,315
Rubber and Leather Manufactures	577,644	1,189,922
Wood and Wicker Manufactures	1,130,689	1,906,039
Earthenware, Chinaware, etc	843,045	1,135,461
Paper and Stationery	2,462,673	3,176,527
Jewellery and Fancy Goods	833,187	1,309,606
Optical, Surgical Instruments	445,732	594,191
Drugs and Chemicals	1,644,584	2,010,236
Miscellaneous	1,255,268	2,954,494
Gold and Silver	36,754	21,192
Total	£44,386,045	£65,649,296

AUSTRALIAN EXPORTS

	July to Dec., 1921	July to Dec., 1922
Foodstuffs of Animal Origin	£ 8,496,533	£ 8,870,510
Foodstuffs of Vegetable Origin	16,836,349	4,550,877
Spirituous and Alcoholic Liquors	200,730	160,673
Tobacco and Preparations thereof	247,599	384,485
Live Animals	105,585	165,756
Animal Substances, not Foodstuffs	21,854,467	33,799,188
Vegetable Substances and Fibres	713,731	603,111
Apparel, Textiles, etc	617,995	479,309
Oils, Fats and Waxes	1,007,105	1,053,875
Paints and Varnishes	62,277	35,303
Stones and Minerals, Ores, etc	867,117	1,750,376
Metals, Machinery, etc	2,238,641	2,355,762
Rubber and Leather	630,329	500,443
Wood and Wicker Manufactures	747,851	592,248
Earthenware, Chinaware, etc	102,122	46,800
Paper and Stationery	141,437	126,299
Jewellery and Fancy Goods	84,715	100,607
Optical and Surgical Instruments	73,467	81,301
Drugs and Chemicals	353,556	274,836
Miscellaneous	360,255	303,479
Gold and Silver	2,225,980	1,794,986
Total	£57,967,841	£58,030,224

THE AUCTION SALE AS A METHOD OF INTRODUCING NEW BRANDS INTO THE INDIAN MARKET

Trade Commissioner H. A. Chisholm

Calcutta, February 15, 1923.—India is an extremely difficult market in which to introduce a new or untried brand of such goods as are in popular demand throughout the bazaars. In northern countries where the entire population is literate, advertising may create a demand for a new brand of flour or canned goods or hammers or locks, but in India, where most of the vast population is illiterate, newspaper advertising as a means toward this end is almost out of the question, except for a high-class line of goods making its appeal to Europeans and educated Indians. The problem facing the foreign manufacturer who desires to develop a market for articles in universal demand throughout Indian bazaars is simply the problem of placing his goods for sale in the bazaar shops where the buying public will see them and price them and finally buy them if they offer good value. If two or three dealers in Calcutta find that a new brand is selling well, it is not long before the bazaars throughout the country know it and inquiries begin to pour into the distributors or the manufacturer.

A well-known importing and auctioneering firm in India, who are famous for their great daily auctions, are now using to good account their facilities for introducing new brands through these auctions. German manufacturers especially are taking advantage of this medium. The methods usually pursued are as follows: The manufacturer or exporter sends a consignment of his goods to this auctioneering firm with instructions to sell them to the highest bidder. These goods are in due course sold to a bazaar broker at a price which represents a loss to the shipper. The broker then sells out at a profit to the various bazaar merchants in Calcutta and up country. If the goods are satisfactory, the bazaar merchants themselves try to buy fresh stocks from the auctioneering firm. Assured that a demand now exists for this line, the auctioneers wire to the manufacturer for a fresh consignment. This time a much higher price is brought, because the bazaar finds that the goods will sell. When the third consignment is disposed of, it is often found that the manufacturer secures a higher price than that on his own invoice and he may make a handsome profit. The next development is that the manufacturer receives several orders on a cash basis direct from the bazaar. At this point, however, the manufacturer must exercise the greatest care. Only in very exceptional circumstances is it wise to grant credit to Indian firms at the present time. Bona fide Indian merchants will establish a bankers' credit in London for the purchase of attractively priced goods. As soon as a consignment of goods is thus sold at auction, the consignor is sent the price realized less the auctioneers' commission of 10 per cent. Naturally it is to the advantage of the auctioneers to sell these goods at the highest possible price, as their commission is thereby increased.

Germans firms especially have been using this method of introducing brands new to the Indian market. A line of German electro-plated ware now enjoying a large and profitable market in India got its start two years ago via the Calcutta auction route. But both British and American firms have employed this method of getting into the Indian market. The following are typical of the classes of goods which lend themselves to this method—cutlery, lanterns, canned salmon, hams, hosiery, toilet articles, rubber heels, collar buttons, watches, hand tools, anvils.

[The name of the firm mentioned in the above report may be secured by applying to the Director, Commercial Intelligence Service, referring to file No. T.C.-4-105.]

RADIO EQUIPMENT IN BELGIUM

Trade Commissioner A. S. Bleakney

Brussels, February 28, 1923.—The receipt at this office of a Canadian *Radio Review* has drawn attention to the rapid development in Canada of the manufacture of radio supplies and has suggested a brief outline of the market for equipment in Belgium.

In contrast with the United Kingdom, where equipment made in that country only is permitted, the market in Belgium is free. The Belgian Department of Post and Telegraph controls the traffic in commercial messages and does not tolerate private competition, but individuals are permitted to install private sets freely under licenses which are readily granted, and foreign equipment is sold on the same footing as that of local manufacture. There are three important Belgian manufacturers of wireless equipment. These have their offices in Brussels, and have retail shops of their own. As broadcasting is in its infancy in Belgium, the sale has not developed to anything like the extent it has done in the United States and France. The Belgian Army authorities give a concert every Sunday at 6 p.m., and the Eiffel Tower broadcasts an entertainment from 6.20 to 7 each evening. The Radio Electric at Levallois, near Paris, also gives an hour's concert at 5.20 p.m., and another from 8.45 to 10 p.m. The concert at The Hague is also to be heard on Sunday afternoons for two hours. The British broadcasting is, of course, also available in Belgium, but most Continental sets are resistance-coupled on the H.F. side and are consequently not suitable for the 400-metre wave lengths of the British stations. One British firm recently gave a demonstration of a five valve set, and a Newcastle broadcasting was received with great distinctness. It has just been learned that this firm has completed arrangements for the manufacture of this set in Belgium and hope shortly to put it on the market at roughly half the price in England. The trade advise that a French company have been given a concession for regular broadcasting which should commence in a few months. One can thus appreciate that there is not, at present, the same stimulus to sales in Belgium which exists in countries where broadcasting is further advanced. There is, however, every evidence that the public are intensely interested in the subject.

LAMPS

Prices as a general rule are low here as compared with Canadian prices. The French "R" type of lamp, retailing at 34 francs each, is in universal use. It works on 4 to 6 volts and consumes 0·7 amps.

TUNERS

Tuning is not in an advanced stage in Belgium among amateurs, much use still being made of the ordinary tuning coil or cumbersome loose coupler. The use of the plug-in duo lateral and other coils is just commencing. Basket coils, spider web and others controlled by multi-point switches are in general use. Vario couplers are practically never seen, as on the Continent the wave lengths are generally too long (over 1,000 metres). A loose coupler with slider on primary and stud control of secondary for wave lengths up to 3,000 metres, retails for 140 francs in good finish and substantial construction. A demand is beginning in Antwerp for the larger duo lateral coils for super regenerative experiments. These are imported from the United States. A 200 spire coil retails for 15 francs, a 1,250 spire coil for 35 francs, and a 1,500 spire coil for 40 francs. Figure 6 shows a French type of unit coil tuning equipment which is being introduced. The mounting retails at 50 francs and a coil giving a range of 800 to 2,500 metres, with 0·001 mfd. condenser, retails at 17.50 francs; other coils in proportion.

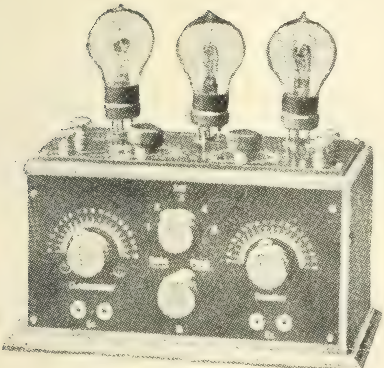

Fig.1.

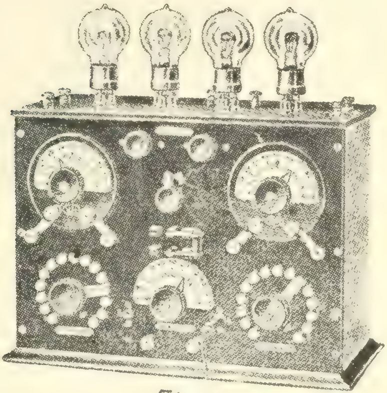

Fig.2

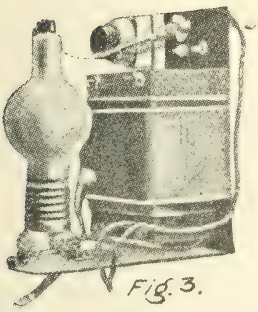

Fig.3.

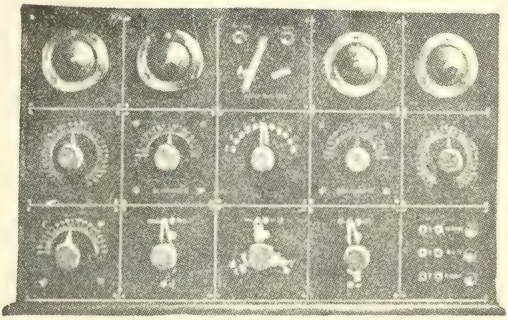

Fig.4.

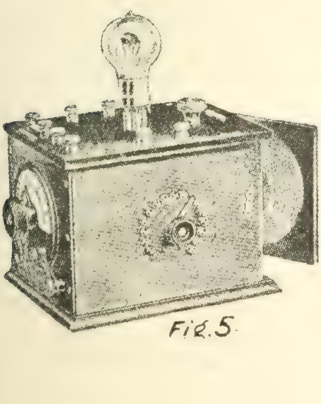

Fig.5.

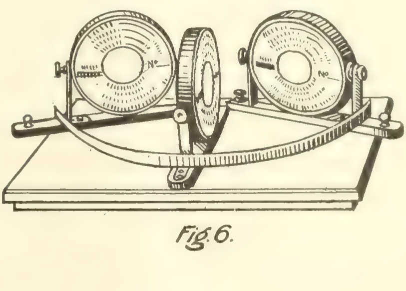

Fig.6.

CONDENSERS

In this branch of the trade, the demand is for the same type as used in America. The vernier adjustment has just appeared in the market. A 25 fixed plate product with 24 moving plates, of the usual diameter, retails for 105 to 120 francs, with the vernier adjustment controlling 3 plates. Without the vernier adjustment, a 10 moving plate condenser of 1/1000 mfd. retails for 60 francs, while a 20 plate model of 2/1000 mfd. is 20 francs dearer.

RESISTANCE AND INTERVALVE TRANSFORMERS

Resistance coupling groups consisting of one 70,000 ohm. ocilite resistance, one 1/10,000 mfd. condenser and a 4 megohn grid leak, retail at 15 francs. This is the usual form of H.F. coupling used. A "L.F." transformer wound ½, sells for 35 francs and up, according to yield and winding.

FILAMENT BATTERIES, RHEOSTATS AND CHARGES

A good Belgian accumulator of 6 volts and 48 ampere hours of effective capacity (steady use), sells for 250 francs. Complete illustrations and factory prices of these are on file at the Department of Trade and Commerce, Ottawa, and may be obtained by interested Canadian firms. Charging is rather expensive. It costs 6 francs to charge the above type, and consequently accumulator charges are on the market. The General Electric Company's "Tungar" charger for 200 to 250 volts A.C. retails at 360 francs. (See Figure 3.) This rectifies and charges at a 2-ampere rate.

FILAMENT RHEOSTATS

One Belgian rheostat mounted on "Eternit" (a potent non-heating composition) in poor finish, sells for 15 francs. Another rheostat stud control sells at 17.50 francs. A precision rheostat sells at 20 francs.

COMPLETE SETS

Whereas in Paris and London and other broadcasting centres there is a large demand for simple and comparatively cheap crystal sets, for obvious reasons there is practically no call for these in Belgium at the present time. The long-distance reception involved results in popularity for three and four-valve sets. These sets include one or two stages of radio frequency amplification. Figure 1 shows a three-valve set manufactured in Belgium. This set is guaranteed to receive the Eiffel Tower concerts with loud speaker when used with outdoor aerial, embodying two wires 30 metres long 30 to 40 feet high. The first lamp is H.F., second is Detector, and the third is a note magnifier. Tuning is up to 5,000 metres. The price of this set is 600 francs without lamps, telephones or A and B batteries. The lamps cost 34 francs each, telephones 2 x 0·2000 ohms (French) cost 80 francs, accumulator costs 200 to 250 francs, and H.T. batteries (80 volts) 40 francs, bringing the set to over 1,000 francs or $54 at the present time. The duty on such sets is 72 francs the 220 pounds, wireless equipment generally coming under Item 33 of the Belgian Tariff (machines of copper or other material): and of course the question of patents must be carefully gone into before placing goods on the market. Patents in Belgium are granted freely on application, and it is left to patentees to fight out each case in the courts.

Figure 4 shows a panel type adopted by a Belgian company. Such a system has the advantage of avoiding patented circuits, as each unit can be connected up by the customer following instructions. Another Belgian company manufactures

on a somewhat similar system, showing the connections diagram vertically on the panel of each unit. Several French sets are also represented here. Figures 2 and 5 show examples of these. Another Belgian company makes a 4-valve set for 800 francs without accessories. Illustrations and prices covering all wireless receiving equipment are on file at the Department of Trade and Commerce, Ottawa, and may be obtained by interested Canadian firms on request.

Should Canadian exporters find that prices will permit, the names of the local manufacturers are on file at the Department of Trade and Commerce, Ottawa, and as a general rule these firms handle a few foreign specialties to complete their own range. The large departmental stores are also installing wireless departments and should be suitable prospects for smaller quantities. There are a great many fair-sized electrical shops in Belgium, and a few of these are already commencing to stock radio equipment. For the supply to these, one of the larger electric supply houses might be suitably approached. A list of these has been accordingly filed with the department.

TRADING POSSIBILITIES IN HOLLAND FOR CANADIAN PRODUCTS

Trade Commissioner Norman D. Johnston

(7) The Market for Syrup and Honey

DUTCH IMPORTS OF SYRUP AND MOLASSES

Rotterdam, February 21, 1923.—A large number of firms in Holland have expressed an interest in the lighter grades of corn and cane syrup, and it is therefore desired to point out the possibilities of the Dutch market, sources of competition, and the most advisable way of developing the business in Canadian syrup.

The principal sources of supply for syrup have been the United States and Great Britain. In 1921 the total imports into the Netherlands of melada, syrup and other liquids containing sugar with a degree not exceeding 68 per cent amounted to 168,701 kg. valued at 35,111 fl., which, however, was a very low import figure as the quantity received from abroad in 1920 was 861,293 kg. with a value of 237,298 fl. The United States supplied 132,711 kg. valued at 27,098 fl. in 1921 and 774,283 kg. with a value of 213,701 fl. in 1920, and Great Britain furnished 21,272 kg. valued at 5,728 fl. in 1921 and 85,147 kg. with a value of 23,127 fl. in 1920. The preliminary statistics show that the total importation in 1922 was about 807,000 kg. valued at 84,000 fl., in which trade the same two countries mostly participated.

A larger import trade was done in the higher grade syrup, and in 1921 the total imports of melada, syrup and other liquids containing sugar with a degree exceeding 68 per cent were 2,665,257 kg. with a value of 364,344 fl., of which the United States supplied 2,216,651 kg. valued at 297,271 fl., and Great Britain 448,258 kg. valued at 66,563 fl. The import in 1920 amounted to 1,246,840 kg. with a value of 358,928 fl., the chief sources of supply being Great Britain with 785,609 kg. valued at 170,001 fl., the United States with 447,000 kg. valued at 170,292 fl., and Belgium with 11,200 kg. valued at 14,967 fl. The preliminary figures for 1922 indicate a total import of about 2,230,000 kg. with a value of 231,000 fl.

Molasses and other juices of sugar, imported free of duty, destined to be used in Holland for the manufacture of spirits, were not bought from abroad from 1919 (when 15,780 kg. valued at 3,840 fl. were imported) up to 1922, when the quantity received was about 167,000 kg. with a value of 11,000 fl.

Other molasses, however, were continually imported, and that with a degree not exceeding 68 per cent entering Holland from outside sources in 1921

amounted to 366,598 kg. with a value of 35,263 fl., of which 295,410 kg. valued at 24,612 fl. came from Belgium and 33,759 kg. valued at 5,268 fl. from British possessions in America. The total import in 1922 was about 201,000 kg. valued at 29,000 fl., and in 1920 was 316,056 kg. with a value of 71,319 fl., of which latter amount Curaçoa furnished 96,376 kg., Venezuela 64,136 kg., Great Britain 50,483 kg., British America 50,145 (valued at 9,207 fl.), and the United States 30,328 kg.

Molasses with a higher degree than 68 were also imported in 1920 to the amount of 344,178 kg. valued at 65,113 fl., of which British America supplied the largest part, namely 265,346 kg., and Suriname most of the remainder, 38,809 kg. The import in 1921 was lower, being only 109,064 kg. with a value of 18,752 fl., of which the British possessions in America furnished 81,040 kg. valued at 15,064 fl. In 1922, according to the preliminary statistics, about 131,000 kg. valued at 18,000 fl. were imported.

It is not possible to say exactly what part of the imports came from Canada, but it will be seen that the British possessions in America took quite an important share of the trade.

Cane Syrup

High-grade syrup from Canada is not in much demand in Holland at present, as it is too expensive and the duty is much higher than for the lighter grades. Practically all the inquiries received from Dutch firms have therefore been for a low-grade product such as cane syrup, with a polarization of not higher than 68. If the polarization is not higher than 68, the Netherlands Customs duty is 6 fl. per 100 kg., while if the polarization is higher than 68 the duty rises by graduated steps according as the degree of polarization increases.

Both light-coloured and brownish-coloured syrup are required, but the principal demand is for the light golden-coloured syrup. Imports of this cane syrup arrive mostly in barrels of about 200 kg., and this is the size chiefly desired. Buying is done on the quality and colour of the syrup, and it will therefore be necessary to submit samples so that they may be examined before business can be inaugurated.

Corn Syrup

Quite a large trade is done in the Netherlands in corn syrup. Syrup of light colour is mostly sold, the darker colours being in very little demand. Inquiries have been received for this syrup in tierces of 200 kg., casks or barrels of 300 pounds, and casks of 50 gallons. This product is also sold according to quality and colour, and it will therefore be necessary to send samples.

Golden Syrup

An endeavour has been made to get Dutch firms interested in what is known in Canada as golden syrup but without success as it is too expensive and the duty, on account of the higher degree of polarization, makes the retail selling price higher than the people will pay under present conditions.

Maple Syrup

As far as can be ascertained, maple syrup is practically unknown in Holland, and it will probably be too high in price to become a large selling article. It may also be too sweet for the Dutch taste.

One firm in Amsterdam, however, whose director has been in Canada and the United States and has used maple syrup, thinks that some trade might be worked up in this commodity, particularly as large quantities of pancakes and similar products are used in Holland. It would of necessity be a luxury article, and he therefore thinks that the best way to introduce maple syrup on the

market would be in glass bottles or jars so that it may be seen easily by the public. Any Canadian exporter interested can be placed in touch with the firm in question.

Honey

Honey is quite an important article of consumption in Holland, and a keen desire has been shown by certain Dutch firms to import this commodity from Canada. Many countries have in the past shipped honey to the Netherlands, but the largest sources of supply have been the United States, Great Britain, Cuba, France, and Chile.

QUANTITIES RECEIVED FROM PRINCIPAL SOURCES OF SUPPLY

The trade in imported honey has shown a great expansion annually for some years back, and while the total import of honey and artificial honey in 1920 was 2,114,179 kg. valued at 1,566,719 fl., it rose in 1921 to 3,465,957 kg. with a value of 1,368,596 fl., and in 1922 to about 4,500,000 kg. valued at 1,462,000 fl. As shown by these figures, a considerable fall in price has taken place. During these three years the United States has maintained the lead in the trade, but last year Cuba almost overtook her.

In 1921 the United States exported 1,476,858 kg. of honey and artificial honey to Holland. Great Britain sent 611,678 kg.; Cuba, 524,950 kg.; France, 422,778 kg.; Chile, 355,619 kg.; and Germany, 36,035 kg. According to the preliminary statistics for 1922, Cuba, with exports of 1,447,000 kg., almost caught up to the United States, which supplied about 1,814,000 kg.; Chile sent approximately 369,000 kg.; France, 292,000 kg.; and Great Britain, 271,000 kg.

KINDS OF HONEY IN FAVOUR

The growth of the trade in Cuban honey in Holland has been remarkable, and it is likely to increase this year still more, as it is greatly in favour among the Dutch people. As far as the month of January was concerned, however, Cuba, the United States, France, and Chile divided the trade about equally, each having supplied about 148 metric tons, with smaller lots coming from Great Britain. The bulk of the honey imported from Cuba is received in barrels of about 50 gallons. The imports from France come largely from Brittany and are chiefly a fine grade of buckwheat honey which is heavily boiled, brownish in colour, with a rich aromatic flavour. Chilian honey is not quite as much in favour as some of the other kinds, but quite a good business is done. Most of the imports from the United States consist of buckwheat honey, although a smaller trade is done in clover honey. The American buckwheat is of a fine taste and is principally of a light brownish colour.

The kind that would be most acceptable from Canada is buckwheat honey of a light amber colour, and to a lesser degree light-coloured clover honey. The honey should be pure, light and thick. Some trade has already been done in Canadian honey, which seems to be held in high esteem by Dutch firms, and as the crop has been rather short this season and prices are consequently higher than otherwise, there would appear to be a splendid opportunity for Canadian exporters to secure a much larger share of the business.

PACKING OF HONEY

For packing honey for shipment, barrels or casks are very much preferred, especially for buckwheat honey. The size of the barrel or cask does not seem to be of great importance as long as it contains the stated amount. The largest proportion of the barrels or casks used for this purpose, however,

appear to contain approximately either 300 kg. (600-700 pounds) or 50 gallons, while some of the American honey is imported in small barrels of 25-30 gallons. Certain of the Dutch firms have stated that they wanted honey only in barrels, and that there was no sale for it in tins, but a well-known packing of honey is in two 60-pound tins in a case. In this latter form Californian honey is imported into the Netherlands. Smaller tins or containers are only sold in very small quantities.

While Canadian honey is packed chiefly in small cans or pails, in developing the trade to Holland it will be advisable for exporters to pack the product in barrels or casks, as a great preference is shown for this method of packing. Great care should be taken in selecting and strengthening the barrels and packing the honey in order to avoid any leakages during transit.

HONEY PRICES

United States firms generally quote in American currency per pound c.i.f. Holland with the usual tare deduction for barrels. United States honey of good flavour and colour has been obtainable in Holland retail at about 25 fl. per 50 kg. duty paid, the duty being 1.25 fl. per 50 kg., thus giving a price of 23.75 fl. per 50 kg., so the cost price to the importer will have been about 7½ or 8 American cents per pound c. and f. Holland.

DUTIES ON SYRUP AND HONEY

The Netherlands duty on melado, molasses, syrup and other liquids containing sugar with a degree under 68 is 6 fl. ($2.41) per 100 kg., and for every degree over 68 an additional 36 Dutch cents (14½ cents) is charged.

The duty on honey imported into Holland is 2.50 fl. ($1) per 100 kg.

THE SENDING OF SAMPLES TO AGENT

As both syrup and honey are sold according to colour and quality, it is necessary to send type samples of the various grades in order that they may be examined. It is almost essential to have an agent in Holland who can submit the samples to the various wholesalers and importers and keep them, together with prices, constantly before the principal firms. Care should be taken to supply orders absolutely equal to the samples.

SHIPMENTS ON CONSIGNMENT

Practically all firms in Holland think that by far the best way to introduce a new brand of syrup or honey is first to send consignments so as to demonstrate the colour and quality. This is undoubtedly a good plan, as it enables small orders to be filled from stock until the brands have become known, and it also enables business to be obtained which might otherwise be lost under present ruling conditions, when trade is uncertain and some firms do not want to contract ahead or buy in large quantities.

Care, however, should be taken in sending consignments, and the standing and reliability of the firm ascertained before such business is entered into. The amount consigned at a time should not be any larger than absolutely necessary to fulfil the purposes required. Frequent small shipments on consignment are better than a few large shipments, as they create a quicker turnover. The fulfilling of orders, submitted through the agent, direct to the importers should be the principal object in view, and the consignment business should only be

as an aid to direct shipments in order to introduce the brand, to supply the smaller orders, or to keep a firm supplied until the main direct orders come to hand.

BUSINESS ARRANGEMENTS

A representative who is well known in the trade in Holland should be appointed, who will sell the goods on commission to the chief wholesalers and importers. The usual commission is 2½ per cent, postage and cables being for the account of each party. If a consignment business is entered into, the agent should send an account of sales each week and the money should be paid into the bank on the due dates, the books being examined and certified by a chartered or certified accountant at least once a year.

Quotations should be submitted c.i.f. Dutch ports, Amsterdam or Rotterdam, or at least f.o.b. Canadian ocean port. The former, however, is much preferred as it enables the landed costs to be known.

The usual terms of payment are net cash (sight draft on the buyers) against a full set of shipping documents on first presentation in Holland, without discount. It is no use trying to do a business on terms of payment in Canada against bills of lading by means of an irrevocable letter of credit, as Dutch importers will not even consider such arrangements because they can get terms of at least cash against documents in Holland from the exporters of other countries with whose syrup or honey they are acquainted. It is therefore unlikely that they will be willing to buy from a new source on poorer terms, which would mean tying up their money for a longer period. In developing a business it will be necessary to meet competition in terms as well as in quality and price.

Canadian firms interested in shipping syrup or honey to Holland are invited to communicate with the Canadian Trade Commissioner, who will be glad to furnish any information and put them in touch with commission agents or importers and otherwise assist them to get established in the Dutch market.

THE MARKET FOR APPLES IN MEXICO

TRADE COMMISSIONER C. NOEL WILDE

Mexico City, March 16, 1923.—Mexico, on account of its situation and fertile soil, is a large grower of many varieties of tropical and sub-tropical fruits; bananas, oranges, pineapples, and numerous others, the names of which are almost unknown in more northerly countries, are produced in practically all cultivated parts of the Republic. These are generally cheap in price and of good quality, and therefore form a substantial portion of the food of all classes of the population.

Among other fruits, apples are grown in the more elevated regions, but on account of the climate they do not reach the state of perfection to which they attain in colder countries. At the same time the apple is highly appreciated, and may be seen displayed for sale in all stores which deal in fruit products.

Although a certain proportion of these apples may be grown locally, the better qualities are imported; these imports have now reached substantial proportions, and a profitable trade is done by the few firms which make a specialty of the business.

IMPORT STATISTICS

The statistics issued by the Mexican Government do not differentiate between the imports of fresh apples and other fruits and vegetables. No reliable figures can therefore be obtained from this source, but information other-

wise secured indicates that the total imports for the past few years have been approximately as follows:—

1913,	the	equivalent	of	93,000	boxes,	valued	at	$107,000	Canadian	Currency
1914	"		"	33,000	"		"	50,000	"	"
1915	"		"	24,000	"		"	30,000	"	"
1916	"		"	31,000	"		"	47,000	"	"
1917	"		"	110,000	"		"	190,000	"	"
1918	"		"	150,000	"		"	327,000	"	"
1919	"		"	70,000	"		"	190,000	"	"
1920	"		"	113,000	"		"	330,000	"	"
1921	"		"	126,000	"		"	400,000	"	"

It will be seen that in spite of wide variations in quantity, the general tendency of the imports is to increase. The Mexican market therefore offers a favourable opportunity for Canadian exporters of apples, the only difficulty being in the long rail haul as compared with that from competitive points.

SOURCE OF SUPPLY

The principal source of supply is the Pacific Coast area of the United States. The Wenatchee Valley is favourably mentioned in this connection, and the Hood River Valley has a good reputation for the quality of its product. Other Pacific Coast districts are reported to send smaller quantities to Mexico, but the Canadian product appears to be quite unknown. At the same time, importers state that they would be glad to consider the possibility of obtaining apples from British Columbia, provided prices and quality were competitive. There appears to be little demand for the Eastern apple, although no explanation is obtainable as to the reason for the prejudice against it, other than the fact that it is not liked by either the retailer or the consumer.

VARIETIES PREFERRED

Of the varieties preferred, it is reported that the ones most suited for early season delivery are the Jonathan or the King, these being first on the market. The Black Ben Davis comes next, though it is claimed that this occasionally gets too ripe, and for this reason is not looked upon with such favour as other varieties. The Winesap has a good reputation, and the Winter Banana is popular, as also is the Ortley, a yellow apple from the Hood River district.

There is only a small demand for other varieties, and importers recommend that Canadian growers confine their attention to the above named.

PACKING

In Mexico the preference is for packing in boxes; apples in barrels have no sale, and are practically unknown. The apples should be carefully graded, and fruit of one size only should be packed in the box. The grades imported are known respectively as "Extra Fancy" and "Fancy," corresponding roughly to the Canadian classification Nos. 1 and 2; "Choice" grades and culls are not required, and under no circumstances should an attempt be made to obtain a market for these. Each apple should be carefully selected, graded and wrapped, in accordance with the usual Canadian custom.

In regard to sizes included in one shipment, the following selection is quoted by a large importer as being most suitable for the Mexican market: 25 per cent, 100 and larger; 50 per cent, 125 to 150; 25 per cent, 163 to 175.

The weight of the apples in each box should be as closely as possible 20 kilos. The box and apples together should weight 23 kilos, or very slightly in excess of 50 pounds. The box should be of standard size, as both wholesalers and retailers are very insistent upon this point.

METHOD OF DISTRIBUTION

Apples are usually imported direct into Mexico by the wholesaler, the intervention of an agent as a rule being unnecessary. This latter practice, however, is adopted in some cases, and there is no reason why Canadian exporters should not deal through a manufacturers' representative or commission agent if there is any personal preference for this method.

The wholesaler sells direct to the retail stores, and thus there is a very direct connection between the exporter and the consumer. In general, apples are purchased f.o.b. shipping point, and the buyer pays freight to final destination.

Shipment is usually made by the all-rail route, it being considered undesirable to ship by sea on account of the difficulty of preventing deterioration of fruit when unloaded at Mexican ports and reshipped to interior points; this difficulty, of course, is due to the tropical climate on the coasts of Mexico. In general, consignments are usually sent via Laredo, Eagle Pass or El Paso, depending upon points of consumption. Shipment is always made in carload lots, and smaller consignments are unacceptable to importers on account of the difficulties of handling l.c.l. at the Mexican border.

The period of shipment is from September to April.

PRICES AND TERMS

The prices at preesnt being paid by Mexican importers are reported to be approximately as follows:—

	Extra Fancy	Fancy
Jonathan, for early delivery, per box	$ 1 25	1 00
Black Ben Davis, per box	1 10	0 90
Winesaps, per box	1 30	1 00

The freight rate to Mexico from present sources of supply is stated to be about $1.50 per 100 pounds, and in addition there is a charge of $75 per car for icing and refrigeration.

Terms of payment are usually cash against documents, subject to inspection and acceptance of boxes on arrival.

CUSTOMS DUTIES

The customs duty on fresh fruits entering Mexico is 2 cents per kilo., Mexican currency, this duty being based upon the weight of apples plus the containers, and in addition there is is a surcharge of 12 per cent on account of municipal and federal taxes. The total duty is therefore equal to about ½-cent per pound, Canadian currency. No preferences are given in the Mexican Tariff, and competition in this respect is therefore equal from all countries.

There are no embargoes or restrictions on the importation of fresh apples into Mexico.

GENERAL REMARKS

Mexican importers have expressed a desire to hear from Canadian firms who are capable of supplying apples equal to those at present on the market. Success depends entirely upon quality, price and nature of packing, and as it is known that Canada can compete on these points, there is no reason why exporters from the Dominion should not be able to secure a substantial portion of the trade.

Names of reliable importers have been forwarded to the Department of Trade and Commerce, Ottawa, and may be obtained on application to the Director, Commercial Intelligence Service (quoting file No. T.C.-4-127).

REGISTRATION OF TRADE MARKS AND LABELS IN MEXICO

Trade Commissioner C. Noel Wilde

Mexico City, March 12, 1923.—The attention of Canadian manufacturers and exporters is drawn to the importance of registering their trade marks and labels in Mexico before attempting to do business with that country.

NECESSITY FOR REGISTRATION

In common with many other Latin-American republics, the right to use a trade mark in Mexico is based upon registration, and not upon prior use in other countries. Thus it has frequently happened in the past that exporters have shipped goods to Mexico bearing a well-known label, brand or trade mark, only to find that this has shortly afterwards been registered without their knowledge; they have then found it necessary either to enter into long-drawn-out legal proceedings or to purchase the right to use their own marks from the person who has been shrewd enough to forestall them; in either case at a cost far in excess of what would have been incurred if proper precautions had been taken in the first place.

WHAT CONSTITUTES A TRADE MARK

The law dealing with the registration of trade marks in Mexico is dated the 25th of August, 1903, and no subsequent changes have been made since that time. In general, it is laid down that trade marks may be names of distinctive forms, denominations, labels or brands, covers, containers or receivers, stamps, seals, vignettes, borders, ornaments, filigrees, engravings, shields, emblems, reliefs, numerals, or other devices of a similar character. These devices are required to carry certain superscriptions, such as "Marca Industrial Registrada," or "M.I.R.," "Marca de Comercio Registrada," "M. de C.R.," and in certain cases the full name of the owner and of the business or industry in which he is engaged must be added.

The following cannot be used or registered as trade marks:—

I. Generic names when the mark is intended to protect objects which are included in the genus or species to which such name refers (this prohibition is based upon the theory that a name serving as a mark must distinguish the protected product from all others of the same genus or class).

I. Anything contrary to good morals, or which tends to bring into ridicule ideas, persons or objects worthy of respect.

III. Arms, shields and national emblems.

IV. Arms, shields and emblems of the various Mexican states or of Mexican or foreign cities, or of foreign nations and states, unless the consent of such states, etc., has first been obtained.

V. Names, signatures, seals and portraits of individuals, without their consent having first been obtained.

METHOD OF REGISTRATION

In order to obtain the exclusive right to the use of a trade mark or label, such trade mark or label must be registered in the Office of Patents and Trade Marks (Oficina de Patentes y Marcas) in Mexico City, in accordance with formalities laid down by law and regulations imposed by the Government department concerned.

These regulations require all individuals or companies who wish to obtain registration to present to the Office of Patents and Trade Marks an applica-

tion accompanied with a description of the trade mark. The application must also state the name of the owner, the name and address of his factory or business (if he possesses same), and a description of the product to which he desires the mark or label to apply; if necessary, this document must also be accompanied by a sketch of the product. Two copies of the application are required, together with an electrotype ("cliché") of the trade mark, and twelve copies of the mark itself.

Trade marks may be registered by Mexicans, foreigners, associations, limited companies and all others who are not legally prohibited from doing so. Application may be made either direct or through a power of attorney.

RENEWALS AND GUARANTEES

The registration of a trade mark must be renewed every twenty years; but delay in this matter does not necessarily cause the loss of the right to the exclusive use of the mark for a further period. It does, however, involve the owner of the mark in certain extra expenses, and during the period between the expiration of the registration and the date of renewal the owner has no legal claim for compensation for infringement by other parties or persons.

An important provision of the law is to the effect that registration of a trade mark in Mexico is made without any previous examination as to its novelty, the applicant taking full responsibility in this matter. The Office of Patent and Trade Marks makes a purely administrative examination of the documents presented, with the object of ascertaining if these are complete and in legal form, in which case registration is automatically granted and the applicant advised accordingly.

SUGGESTED ROUTINE

The necessary steps required to carry out the conditions of the law are somewhat complicated, and the Canadian exporter would be unwise to attempt to deal direct with the Office of Patents and Trade Marks in Mexico. The employment of an agent is not, however, an expensive matter; and, in view of the great simplification of routine which results, it is strongly suggested that the latter course be invariably adopted.

This matter has recently been investigated in detail, and the following instructions should be carefully followed, forming, as they do, the simplest and easiest method of obtaining full legal protection:—

(*a*) In the first place, a form of power of attorney should be prepared on plain paper, size as nearly as possible 8½-inch by 11-inch, a 2-inch margin being left at the left-hand side. This power of attorney should read as follows, the blank spaces being left exactly as shown:—

* The undersigned................ whose address is................ hereby grants to................ full and sufficient power, jointly or severally, to obtain from the Office of Patents and Trade Marks in Mexico.......... .... for which purpose he is authorized to take before said office all necessary steps for that purpose; to make applications, prepare descriptions, declarations, appeals and claims, pay all charges, require testimony, receive documents, and do all other things which may be necessary before the administrative or judicial authorities of whatever kind, and in the same manner granting authority to transfer said power to a third party.

Given and signed in................................ on the..................day of....................nineteen hundred and...................

Signature..

Witness................................ Witness................................

abajo firmado

domiciliado en

declara por el presente otorgar á

poder amplio y bastante para que, juntos ó separadamente, recabe de la Oficina de Patentes y Marcas de los Estados Unidos Mexicanos, la obtención de

á cuyo efecto le faculta para dar ante dicha Oficina todos los pasos necesarios para el objeto indicado; elevar solicitudes, formular descripciones, protestas, declaraciones, apelaciones y reclamos, pagar impuestos, justificar explicaciones, solicitar testimonios, recibir documentos y hacer cuanto fuere necesario ante las autoridades administrativas ó; judiciales de cualquier orden, dándole asimismo facultad para substituir el presente.

Dado y firmado en (1) á los (2) días del mes de (3) de mil novecientos veinti..........................

Firma de otorgante .

(4)

Testigo.
(5)

Testigo.
(5)

(1) Insert town or city, province, and the word "Canada."
(2) Insert day of month.
(3) Insert month (Enero, Febrero, Marzo, Abril, Mayo, Junio, Julio, Agosto, Septiembre, Octubre, Noviembre Diciembre).
(4) Insert official signature of firm.
(5) Insert names of two witnesses.

The remainder of the blank spaces will be filled up by the agent.

(*b*) Two copies of the trade mark or label should be attached to the above power of attorney; these should be clearly printed on good paper, as it is necessary to prepare electrotypes from them, and on account of the difficulty of reproducing colours by photo-mechanical processes, they should, if possible, be in black and white only. If, however, the original mark or label is in colours, suitable tracings can be made by the agent in Mexico City.

(*c*) A draft for seventy pesos, or its equivalent in Canadian funds (i.e. thirty-five dollars), should be attached to the above, made out in favour of the agent.

(*d*) A letter should be written to the agent giving in detail the kind or nature of goods to which the trade mark or label applies. This should be made as comprehensive as possible, so that the agent may be in a position to select the suitable headings under which the Mexican Government require registration.

The whole of the above should be sent under registered cover to whatever agent or attorney may have been selected, or, if so desired, may be sent to the Canadian Government Trade Commissioner. The sum mentioned in (*c*) covers all costs of every kind for both the Government and the agent, and no further expense need be incurred. The Government fees include 25 pesos for registration, 4.50 pesos for legalization of power of attorney, 5 pesos for publication in the *Official Gazette*, and certain stamp fees; in addition, electrotypes have to be prepared, so that the total charge cannot be considered excessive.

It should be noted that all of the above documents are required for each label, trade mark, etc. Thus, if more than one registration is required, separate power of attorney and letters of instructions are required with each, and, of course, the fee for each registration is seventy pesos.

These precautions will fully protect the owners of trade marks if taken prior to the shipment of goods, and will avoid the frequent difficulties which have arisen in the past in consequence of the theft of marks by unscrupulous persons. The usual period required for registration is from a fortnight to three weeks, so that, allowing for the time taken in mails, everything should be completed in about five weeks from the time the application is first forwarded from Canada.

Copies of the power of attorney described above, together with the name of suitable agents who are prepared to act for Canadian exporters, may be obtained on application to the Commercial Intelligence Branch, Department of Trade and Commerce, Ottawa (quoting file No. 27858).

CHINA AS A MARKET FOR RUBBER GOODS

Assistant Trade Commissioner G. A. Rolf Emery

I

Shanghai, February 23, 1923.—China, although comparatively a small user of goods manufactured from rubber, is the country in which the head offices of many of the smaller rubber plantations are located. Notwithstanding its proximity to crude rubber supplies, and despite the cheap labour to be obtained, the amount of crude india-rubber and gutta-percha imported for manufacturing purposes is only about one-forty-fifth the value of the manufactured rubber goods brought into the country. It is estimated that about 80 per cent of the importations are tires and tubes.

Detailed statistics of the imports of rubber goods into China are not published in the Maritime Customs returns; the following table gives the values by countries from 1919-21:—

IMPORTS INTO CHINA BY COUNTRIES OF INDIA-RUBBER AND GUTTA-PERCHA MANUFACTURES OF ALL KINDS (INCLUDING BOOTS AND SHOES)

	1919 Value HK. Tls.	1920 Value HK. Tls	1921 Value HK. Tls.
Hong Kong	31,882	66,499	103,626
Singapore	10,545	57,257	75,153
Great Britain	33,877	49,528	76,574
France	17,200	93,489	87,596
Belgium	....	133	134,155
Japan	1,049,611	713,356	1,183,020
Canada	35,741	49,126	34,757
United States	344,538	494,836	374,228
Philippine Islands	33,941	64,069	24,640
All Other Countries	23,072	98,753	42,082
Total gross imports	1,580,407	1,687,046	2,135,831

The equivalent of the Haikwan tael in which the customs values are stated was in 1919, G.$1.39; 1920, G.$1.24; and 1921, G.$0.76. In terms of gold dollars the value of the rubber goods imported was in 1919, $2,196,765; in 1920, $2,091,937; and in 1921, $1,623,231.

The slump in the value of the importations in 1921 was due partly to the fall in price of rubber goods, partly to the fall in the value of the tael, and partly to the huge stocks of rubber goods on hand in China at the time and the "tightness" of money caused by the collapse of normal business. Stocks are still very large, and it will take a far more active market than the present to move them before they have markedly deteriorated or rotted.

CUSTOMS DUTY

Under the revised import tariff of China which came into effect on January 17, 1923, the duty on crude india-rubber and gutta-percha is 5 per cent ad valorem. The same duty applies to old or waste india-rubber. Other rubber commodities are not enumerated in the tariff, and for all unenumerated goods the duty is 5 per cent ad valorem. The value upon which duty is calculated is the wholesale market value of the goods in local currency. This market value when converted in Haikwan taels is considered to be higher than the duty-paying value by the amount of the duty on the goods and 7 per cent of the duty-paying value of the goods.

TWO IMPORTANT FACTORS IN COMPETITION

Competition in the sale of rubber goods in China, as in other commodities, is very severe, as it is world-wide. The country lies close to the largest rubber-producing plantations in the world. On the island of Hainan, in the south, China produces a small amount of rubber; and in addition, China and the Southern Asiatic countries afford the cheapest labour in the world. The proximity of crude rubber to cheap labour has been taken advantage of by such concerns as the Dunlop Rubber Company and the Netherlands Gutta-percha Company. The former has a factory in Japan from which the great majority of the rubber tires and tubes required in China are supplied; and the latter distribute from their works in Singapore mechanical and railway rubber goods to supply the needs of the Chinese market. The competition that would be offered by these two firms must not be forgotten by Canadian manufacturers who contemplate selling to China.

The second factor which must be considered is the effect the present period of trade depression and exchange difficulties would have upon any firm entering the field. The fall in the value of the tael from gold $1.39 in 1919 to G.$0.70 to-day has reduced the purchasing power abroad of the Chinese by almost one-half. This depreciated purchasing power in conjunction with the general trade depression has increased greatly the competition of those firms which are already in the market. Each one has been severely tried, and prices are down to the minimum. The field is thus only open to those firms that can produce at the lowest cost. Consequently the time is not ripe for Canadian exporters to lay out the money for necessary sales organizations, stocks and advertising required to sell in the face of such opposition as is to be met in the rubber goods trade in China.

I. Mechanical Rubber Goods

HOSE

(a) Suction Hose.—The suction hose used in China varies in style and construction. Generally speaking, it can be divided into two types—American and other. The American suction hose is strengthened by a flat wire reinforcing on the inside of the tubing. Although the flat wire is subject to rust, it is the most popular type and larger sales of it than of any other are made. Stocks carried have diameters of 2-inch, 2½-inch, 3-inch, 3½-inch and 4-inch. Occasional demands for 5-inch hose are made, but they are so few in number that stocks are rarely carried. The price to the trade ex godown is tls. 1 per foot net for the 3-inch size, which is most frequently called for.

Other types of suction hose are round wire imbedded and corrugated, with or without canvas reinforcing outside, and with or without reinforcing canvas on the inner walls. Another special style has a further reinforcing of round wire on the outside to prevent tear upon being drawn over rough ground. These particular styles are not quite as popular as the American flat wire hose, but stocks are carried in greater range of diameter: 1¼-inch, 1½-inch, 1¾-inch, 2-inch, 2¼-inch, 2½-inch, 3-inch, 3½-inch and 4-inch hose, but the 3½-inch wire imbedded canvas reinforced is the most popular. It sells to the trade at 11s. 5d. less 50 per cent.

(b) Garden hose sold in China is similar to that used in Canada. The flat rubber hose with the two-ply canvas interior reinforcing is the most popular. A very limited market is found for corrugated with round wire binding on the outside, but it is too expensive to secure large sales. The latter is sold in ⅜-inch, ½-inch, ⅝-inch, ¾-inch and 1-inch; the former in ⅜-inch, ½-inch, ⅝-inch and ¾-inch. In both styles the ⅝-inch and ¾-inch are most popular.

The flat garden hose is nearly all imported from Japan, where it is turned out very cheaply. It is laid down in China at such a price that it is practically the only garden hose sold in large quantities. Some foreign companies can lay down the ordinary type of garden hose at Mex. $0.30 per foot, but the Japanese can undersell even that price and thus get most of the business.

(c) Fire Hose.—Owing to the buildings in the principal cities of China being of no great height, fire hose manufactured in Canada and the United States to withstand high pressure is not in demand. In China the pressure needed to throw a stream to the top of the highest buildings is not very great, and consequently the lower pressure hose of England with its lower cost has not a competitive price against it and naturally is more acceptable. The standard size of diameter 2½-inch is the hose ordinarily used by the foreign factories and fire brigades. Most of the demand is for the plain canvas hose, but there is a limited market for rubber-lined pure hemp hose, which is laid down by a well-known English company at tls. 1.91 per foot, less 10 per cent ex godown. The plain canvas hose of British make sells at tls. 0.30 less 10 per cent per foot.

(d) Miscellaneous Hose.—There is a small demand for delivery hose ranging in diameter from ⅜-inch to 2½-inch; for welding hose $\frac{5}{16}$-inch and ⅜-inch; for petroleum discharge hose 2-inch and 2½-inch; for motor car radiator hose of various sizes; and for steam hose and steam hose for high pressure ½-inch, ¾-inch, 1-inch and 2-inch. These are special lines, however; the big demand is for suction hose, garden hose and fire hose.

RUBBER BELTING

Except for out-of-door purposes, rubber belting no longer has the demand it had during the war. The leather belting has returned at such a reduced price that it has practically superseded the rubber filled and coated belting. A special report on "China's Requirements of Belting" was published in *Commercial Intelligence Journal* No. 989 (January 13, 1923).

RUBBER SHEETS

Rubber sheets used for washers, packing and valves are sold in four colours —red, white, black, and grey. The red and white are sold in sheets $\frac{1}{16}$-inch, ⅛-inch, ¼-inch, ⅜-inch, ½-inch, ⅝-inch, ¾-inch and 1-inch thick. The grey sells in ¼-inch, ½-inch, ⅝-inch and ¾-inch thicknesses, and black rubber is $\frac{5}{16}$-inch thick. The width of the sheets varies; Dunlops only sell a 3-foot sheet, whereas the Gutta-percha Company sell 3-foot and 4-foot widths. Ordinarily very bright colours are preferred, but at present the grey is used more extensively because its colour will allow waste rubber to be used, and consequently the price is low. The trade price for the grey is tls. 0.40 a pound, whereas the red, which is composed of pure rubber and chemicals, is tls. 0.55 a pound.

JOINTING

The jointing commonly used is white and grey insertion cloth ranging in thickness by $\frac{1}{16}$-inch from $\frac{1}{16}$-inch to ¼-inch. The present market price for these two colours of cloth is tl. 0.20 per pound. The brass wire insertion is $\frac{1}{16}$-inch and ⅛-inch thick and sells for tl. 0.70 per pound. The rubber flanges are in various sizes and sell by the pound according to the quality of the rubber from which they are made. This jointing trade for Northern China, which amounts to 20 tons a year, is all done through Shanghai, as the outports all buy from that city.

RUBBER TUBING

Red and black rubber tubing and gas tubing are stocked in various sizes, but pump tubing varies in external diameter from $\frac{1}{4}$-inch to $\frac{1}{2}$-inch by $\frac{1}{8}$-inch. The two most commonly used pump tubings, however, are the $\frac{3}{8}$-inch tubing for bicycle pumps and the $\frac{1}{2}$-inch tubing for motor pumps. Both of these have an internal diameter of $\frac{1}{8}$-inch, and for the former there is a large market on account of the number of rickshaws used. The bicycle tubing sells to the trade at M.$0.30 a yard and the motor pump tubing at M.$0.38 a yard. The black, red, and gas tubing sell by the pound at tls. 1.20.

ELECTRICAL RUBBER GOODS

The rubber commodities most frequently demanded for electrical purposes are insulating tape, ebonite sheets, rods and tubes. The sheets range in thickness from $\frac{1}{16}$-inch to 1-inch, the rods in diameter from $\frac{3}{8}$-inch to 3-inch, and the tubes commonly used are $\frac{1}{2}$-inch and $1\frac{3}{4}$-inch. Apart from the large firms which have their own electrical plants, the electrical work of the main cities is controlled by the municipality which calls for tenders. The tenders are usually open for such a short time that the firms on the spot are almost certain to secure the business.

RAILWAY REQUIREMENTS

The railways of Northern China are continually calling for tenders for their rubber requirements in the same way. They require Westinghouse air-brake hose, standard sizes 18-inch, 24-inch and 30-inch, together with coupling joints and washers for steam heaters in standard sizes. Representation or stock on the ground is necessary for successful competition.

MECHANICAL SUNDRIES

A large number of mechanical sundries are stocked by the various rubber companies and are kept on hand to supply the constant demands made by the shipping calling from foreign ports and plying up and down the coast. Diaphragm pump valves with diameters 11-inch, 13-inch, $13\frac{1}{2}$-inch and 16-inch, and ordinary pump valves in various sizes are carried, together with hexagonal gauge-glass rings, rubber cord packing, porthole strips, stabiloid sheets, woodite type gauge-glass rings, etc. Along with such mechanical sundries are stocked vulcanizing materials, bicycle pedal rubbers, bottle rings, rubber cones for W.C.'s, printers' blankets, rubber mats, and rubber matting. All these go to make up the stock of the energetic rubber companies dealing in mechanical rubber goods. The firm must have stocks on hand to supply regular or irregular demands and be in a position to quote on short notice.

STANDARDIZED INVOICE AND CERTIFICATES ADOPTED IN BAHAMAS

The British *Board of Trade Journal,* March 8, 1923, announces that the Bahamas Official Gazette of February 3 contains a notice stating that revised forms of invoice and of certificate of origin and value will henceforth be required in connection with the importation of goods into the Bahamas under the British preferential tariff. It is stated that these revised forms are identical with those recommended for adoption by the Imperial Customs Conference, 1921. The forms in question are set forth in F.T.D. Leaflet No. 32 issued by the Commercial Intelligence Branch, and which is already in possession of many Canadian exporters.

REPRESENTATION IN NEW ZEALAND

Trade Commissioner W. A. Beddoe

Auckland, February 19, 1923.—The question of representation must be determined by the conditions governing trade with various countries. Distance from Canada is an important factor and affects the proposition in several ways. There are three outstanding methods which apply to New Zealand:—

1. Direct representation by a branch house.
2. Occasional visits by accredited members of the home staff, or by a partner, as the case may be.
3. Appointment of an agent.

With respect to No. 1, the establishment of a branch entails heavy expense and can only be justified by the expectation of a large and growing business, and with commodities largely in demand. There is much to recommend this method. In many cases it can be adopted after the experiences of No. 2 and No. 3, which will prove valuable in determining the permanent solution.

There are four centres of business and population in New Zealand—Auckland, Wellington, Christchurch and Dunedin. In case of direct representation of the home house, it would be advisable, although not absolutely necessary, to establish a branch in each of the above cities. Each branch could serve the population tributary to any given city. This would naturally contemplate a business of considerable proportions.

Regarding No. 2, it is most desirable that some person familiar with the business should visit the importers here and discuss affairs face to face. The experience of this office has been that such visits have been followed by a greater volume of business. The large buyers of New Zealand regard it as a compliment when a personal representative of a Canadian firm makes a long and expensive journey, and in following correspondence they can visualize the man to whom they are writing. This is a very distinct advantage and there are many examples to prove it. The knowledge derived from such a visit leads to an intelligent decision as to opening a branch or appointing an agent.

The person sent to represent the house, whether a principal or an employee, should be a man of good address, education and accustomed to associate with gentlemen. He should also be equipped to speak to business men of the Chambers of Commerce, if necessary. He should never forget that to an extent the honour of Canada is temporarily in his keeping and conduct himself accordingly. It is unnecessary to add that he should be in a position to present the case of his principals intelligently.

As to No. 3. The business may not warrant the opening of a branch or the sending of a representative, but it is then advisable to have an agent. Business usually goes to those who look after it and seek it, and in the absence of any specific representative, firms drop out of mind. It is important that an agent should represent one firm only dealing in a certain class of goods. Should one person here represent several houses in Canada, dealing in the same goods, he must necessarily favour one at the expense of the others, who would be practically unrepresented. If one firm secures the agency for several houses in Canada supplying the same goods, he prevents others doing business with them, and eliminates competition.

The importance of having an agent in New Zealand is exemplified in case of dispute as to character of goods, breakage or shortage. A man on the ground can get the facts at first hand accurately and quickly, and can properly represent his principals. It applies also in cases of destruction of cargo on vessels, where the question of general average arises. The firm in Canada with a large shipment would be in a much better position in case of such negotiations if

personally represented by one who knew the facts and in a case like this matters can be adjusted by cable without lengthy correspondence with Canada.

For a number of years this office has asked that Canadian firms send, for filing purposes, the names of their representatives in New Zealand, and their cable addresses. This would afford an opportunity of following up the business to see whether or not it was being neglected or the best results being obtained. This is a very important matter and has been referred to for years with very slight response.

USE OF THE TERM "UNITED KINGDOM"

A term in common commercial use, says the London *Times Trade Supplement*, and one now much discussed among business men is "the United Kingdom," or, as it is sometimes briefly set out, "U.K." One or other of these terms frequently appears in contracts, such as ships' charter parties and policies of marine insurance. Ships are chartered to make voyages to or from one or more ports in the United Kingdom, cargoes are bought and sold for loading or discharge in one or more ports of the United Kingdom, and vessels and their cargoes are likewise insured.

The term "United Kingdom" is itself a contraction for the description of the British Isles as the United Kingdom of Great Britain and Ireland. The future of this term would seem to be uncertain, owing to the establishment of southern Ireland as the Irish Free State. Although questions respecting the Irish Free State are now answered in Parliament by the Colonial Secretary, and various Government departments have been approached with a view to giving a definite ruling as to the status of the Irish Free State, no such definition seems yet to have been accorded. There is, however, general agreement that northern Ireland remains, in any case, within the United Kingdom, and therefore some may hold that the phrase "United Kingdom" now really stands for the United Kingdom of Great Britain and Northern Ireland. For business men who are concerned with definite places and districts, a complication at present is that the precise boundaries between northern and southern Ireland have not yet been fixed.

The documentary committee of the Chamber of Shipping has recently advised shipowners to see that in all charters for the United Kingdom it is definitely stated whether southern Irish ports are or are not included. They also recommend that owners, when effecting policies for voyages to or from the United Kingdom, should provide for the express inclusion of southern Ireland. After some consideration and some little hesitation, both London marine insurance companies and Lloyd's underwriters have agreed that "until further notice, in all contracts, whenever written, whether in policies or on slip, the expression 'United Kingdom' or 'U.K.' shall, unless otherwise defined, be deemed to include the whole of Ireland." It is not suggested that this is more than a temporary measure for the protection of shipowners and merchants, pending a final settlement of the whole question of the term "United Kingdom."

DISCOVERY OF DIAMONDS IN DUTCH GUIANA

Diamonds have been discovered at Brownsweg, Dutch Guiana, about 80 miles from Paramaribo, according to a despatch in the *Daily Argosy* of Georgetown, British Guiana. The prospectors, representing a local syndicate, brought in seven stones. The district where the diamonds were discovered has yielded gold for over 40 years, but is said never to have been thoroughly searched for precious stones.

SALES TAX NOT APPLICABLE TO INVOICES OF EXPORTS

Mr. D. H. Ross, Canadian Trade Commissioner in Melbourne, recently wrote regarding the practice of some Canadian manufacturers in adding to the invoices of exports the Canadian sales tax. The attention of the Department of Customs and Excise having been directed to this practice, that Department in reply advises that the Special War Revenue Act and amendments thereto. Section 19-BBB, provide for exemption of sales tax on goods exported. The exemption reads as follows:—

> "Provided further that the excise taxes specified in this section shall not be payable on goods exported."

There is also provision for drawback of taxes paid on materials used. wrought into or attached to articles exported, under the same section.

The attention of Canadian exporters is specially drawn to the exemption above noted.

IRISH FREE STATE CUSTOMS TARIFF

Mr. G. B. Johnson, Trade Commissioner in Glasgow, writes under date of March 13 that from April 1 the Irish Free State will be separated from the United Kingdom for customs purposes. The commodities affected and the duties imposed are, for the present, he says, the same as those of Great Britain. as no changes in the Free State tariff have been made from the existing tariff.

The London Customs House has issued a notice (No. 79) relative to traffic with the Irish Free State, copy of which has been received from Mr. Harrison Watson, Trade Commissioner in London. The notice states that from April 1 traffic with the Free State, whether by sea or across the land boundary between the Free State and Northern Ireland, will for all purposes be imports and exports subject to the customs laws and regulations applicable to overseas trade. The following paragraphs appear in notice No. 79:—

(6) *Duties and Drawbacks.*—Customs duties will be charged, drawbacks paid and exportations from bonded warehouse allowed in accordance with provisions of the Customs Acts. Special attention is, however, drawn to the temporary arrangements in the matter of dutiable goods described in paragraphs 18-20 below.

(7) *Transhipment and Transit.*—The ordinary regulations will apply to goods imported at ports in Great Britain and Northern Ireland and consigned to the Free State.

(18) *Special Arrangements.*—The following arrangements are temporary. and are intended to facilitate trade in dutiable goods at the outset of the change. The Irish Free State will make the same concessions in respect of goods imported from Great Britain or Northern Ireland, and officers of Customs and Excise in Great Britain and Northern Ireland will give certificates of the kinds explained, for presentation to the Irish Free State officers.

(19) *Modified Import Examination.*—Dutiable goods exported from the Irish Free State under bond from the importing ship's side, or from a bonded warehouse or on drawback, will be admitted into Great Britain or Northern Ireland subject to a modified import examination, provided that there is annexed to the relative import entry, whether prime or warehousing, a certificate from the Customs and Excise officers in the Irish Free State, giving full particulars of each package as ascertained by such officers at the time of landing ex ship, removal from warehouse, or examination for drawback, as the case may be.

(20) (Relates to spirits.)

UNITED STATES DUTY ON SEA HERRING, FROZEN OR PACKED IN ICE

The United States Treasury Department has ruled under T.D. 39492 that the rate of duty on sea herring when imported frozen, or packed in ice, shall be 1 cent per pound, under paragraph 717 of the Tariff Act. Fresh sea herring is included in paragraph 1656 of the Free List.

MAILS TO WEST INDIES, CENTRAL AND SOUTH AMERICA

The Post Office Department has furnished a table of sailings from which the following information for the guidance of Canadian firms writing to the above countries has been compiled:—

Correspondence for the West Indies is forwarded by direct Canadian steamers or via New York, whichever route will give a quicker despatch, although letters marked for transmission by either route are forwarded in accordance with the endorsation.

Letters for Central America are forwarded via New York, with the exception of letters for British Honduras specially addressed "Via Halifax."

Letters for South American countries generally are also forwarded via New York, unless specially addressed "Via Halifax."

Following are sailings for the month of April:—

For		*April*
Antigua	New York	12, 14, 26, 28.
Argentina	New York	4, 10, 11, 18, 25.
Bahamas	New York	5, 6, 13, 20, 27.
Barbados	New York	12, 14, 26, 28.
Bermuda	New York	4, 7, 11, 14, 21.
Bolivia and Chile	New York	5, 14, 19, 28, and every Saturday.
Brazil, North	New York	5, 10, 17, 18, 25.
Brazil, South	New York	7, 11, 14, 18, 20, 25, 28.
British Guiana	New York	11, 13, 14, 27, 28.
Colombia	New York	5, 6, 14, 19, 20, 28, and every Wednesday.
Costa Rica	New York	Every Saturday.
Cuba	New York	13, 27, 28, and every Saturday.
Curacao	New York	5, 7, 14, 19, 21, 26, 28.
Dominica	New York	14, 28.
Dominican Republic	New York	3, 4, 7, 11, 17, 25.
Dutch Guiana	New York	11, 13, 14, 27, 28.
Ecuador	New York	2, 4, 5, 12, 14, 24, 25, 26, and every Wednesday and Saturday.
French Guiana	New York	11, 13, 14, 27, 28.
Haiti	New York	10, 12, 13, 26, 27.
Honduras	New York	2, 4, 5, 14,19, 24, 25, 28.
Guatemala	New York	7, 21.
Jamaica	New York	7, 13, 21, 27, and every Wednesday.
Martinique	New York	12, 14, 26, 28.
Mexico	New York	3, 5, 10, 12, 17, 19, 24, 26.
Nicaragua	New York	2, 5, 19, 24, 28, and every Wednesday and Saturday.
Panama and Canal Zone	New York	2, 4, 5, 10, 14, 19, 24, 25, 28, and every Wednesday and Saturday.
Paraguay	New York	4, 10, 11, 14, 18, 25, 28.
Peru	New York	2, 4, 5, 14, 19, 24, 25, 28, and every Wednesday and Saturday.
Porto Rico	New York	Every Saturday.
Salvador	New York	2, 4, 5, 14, 19, 24, 25, 28, and every Wednesday and Saturday.
St. Kitts-Nevis	New York	12, 14, 26, 28.
Trinidad	New York	11, 12, 13, 14, 26, 27, 28.
Turk's Island	New York	3, 4, 11, 17, 25.
Uruguay	New York	4, 10, 11, 14, 18, 25, 28.
Venezuela	New York	5, 7, 12, 14, 19, 21, 26, 28.

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain.	*Montcalm*	St. John	April 6
" " "	-*Minnedosa*	"	" 7
" " "	†*President Harding*	New York	" 7
" " "	*Canada*	Halifax	" 8
" " "	†*Aquitania*	New York	" 10
" " "	†*President Polk*	"	" 11
" " "	*Montrose*	St. John	" 13
" " "	†*George Washington*	New York	" 14
" " "	†*Mauretania*	"	" 17
" " "	†*France*	"	" 18
" " "	†*Manchuria*	"	" 19
" " "	*Montclare*	St. John	" 20
" " "	†*President Roosevelt*	New York	" 21
" " "	-*Melita*	St. John	" 21
" " "	*Chignecto*	Halifax	" 13
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela	**Canadian Logger*	"	" 7
Barbados, Trinidad, British Guiana, Cuba, Jamaica, and Colombia	**Ottar*	"	" 12
Bermuda, Bahamas, Jamaica, Colombia, British Honduras	**Canadian Fisher*	"	" 12
Bermuda	**Montezuma*	St. John	" 7
China and Japan	*President Grant*	Victoria	" 8
" " "	*Hawaii Maru*	"	" 12
" " "	*Empress of Asia*	Vancouver	" 19
" " "	*President Madison*	Victoria	" 20
Australia and New Zealand	‡*Maunganui*	San Francisco	" 13

† Letter mail only. * Parcel post and specially addressed correspondence only.

‡ Letter and Paper mail only.

- Papers, Parcel Post and specially addressed correspondence only.

Note.—The *Minnedosa* will be used for direct mail for the Continent including direct Parcel Post to France.

THE LEATHER BELTING MARKET IN ARGENTINA

The use of belting in Argentina has increased greatly in recent years on account of the rapid industrial development in that country during the war, according to *Saddlery and Harness* (Walsall, England). Imports of belting of all classes into the country are almost double the pre-war figure, and great strides have been made in the domestic manufacture of leather belting and in experiments with other classes. The total capacity of existing local factories is sufficient to meet the wants of the Republic, but up to the present the tanning of the leather belting leaves much to be desired as compared with that tanned abroad.

Oak tanned belting is considered the best on the market, and in some lines the domestic manufacturers imitate its general appearance to the best of their ability. It is estimated that normally about 50 per cent of the belting used in the country is of domestic manufacture. Leather belting of local manufacture sells at about 40 per cent less than imported belting of the better class. Great importance is attached to trade marks in Argentina and most of the imported beltings are sold under the manufacturers' marks, duly registered in the Republic, and this is to be recommended in the case of beltings that are to be marketed on a quality basis.

TENDERS INVITED

Australia

Copies of tender forms and specifications have been received from Trade Commissioner D. H. Ross, Melbourne, for material required by the Commonwealth Postmaster-General's Department at Melbourne, Victoria, and Brisbane, Queensland.

These tender forms and specifications are open to the inspection of interested Canadian manufacturers at the Department of Trade and Commerce, Ottawa (refer to file No. 28865).

Tenders in conformity to the specifications should be promptly addressed to the Deputy Postmaster-General at Melbourne, Australia, in response to schedule No. V. 120, and to the Deputy Postmaster-General, Brisbane, Australia, in response to schedules Nos. 568 and 576.

Particulars of the requirements are briefly outlined thus:—

No.	Date of Closing	Particulars
V. 120	June 5, 1923.	Supply and delivery of Testing and Special Instruments for telephone work, as specified.
568	May 16, 1923.	Supply and delivery of one Lamp-signalling Switchboard of four trunk and one cable turning section together with one recording desk and associated parts, as specified.
576	May 11, 1923.	Supply and delivery of 185 Cable Terminal Boxes, as specified.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING MARCH 27, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement on the nominal closing quotations for all the principal exchanges for the week ending March 27, 1923. Those for the week ending March 20 are also given for the sake of comparison.

		Parity	Week ending March 20, 1923	Week ending March 27, 1923
Britain .. .. £	1.00	$4.86	$4.7968	$4.7701
France .. .. Fr.	1.	.193	.0665	.0667
Italy .. .. Lire	1.	.193	.0496	.0502
Holland .. .. Florin	1.	.402	.4039	.4012
Belgium .. .. Fr.	1.	.193	.0576	.0576
Spain .. .. Pes.	1.	.193	.1581	.1568
Portugal .. .. Esc.	1.	1.08	.0460	.0457
Switzerland.. .. .. Fr.	1.	.193	.1894	.1881
Germany .. .. Mk.	1.	.238	.000049	.000049
Greece .. .. Dr.	1.	.193	.0115	.0127
Norway .. .. Kr.	1.	.268	.1865	.1842
Sweden .. .. Kr.	1.	.268	.2728	.2707
Denmark .. .. Kr.	1.	.268	.1968	.1953
Japan .. .. Yen	1.	.498	.4960	.4934
India .. .. R.	1.	2s.	.3247	.3230
United States .. .. $	1.	$1.00	1.0228	1.0175
Mexico .. .. $	1.	.498	.5024	.4954
Argentina .. .. Pes.	1.	.424	.3797	.3777
Brazil .. .. Mil.	1.	.324	.1150	.1132
Roumania .. .. Lei	1.	.198	....	....
Jamaica .. .. £	1.	4.86	4.8187	4.7873
British Guiana .. .. $	1.	1.		
Barbados .. .. $	1.	1.		
Trinidad .. .. $	1.	1.		
Dominica.. .. .. $	1.	1.		
Grenada .. .. $	1.	1.	.9978-1.0029	.9878-9918
St. Kitts .. .. $	1.	1.		
St. Lucia.. .. .. $	1.	1.		
St. Vincent .. .. $	1.	1.		
Tobago .. .. $	1.	1.		
Shanghai, China .. .. Tael	1.	.708	.7862	.7822
Batavia, Java .. .. Guilder	1.	.402	.3976	.3955
Singapore, Straits Settlements .. $	1.	.567	.5676	.5647

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1435. Flour.—A firm in Johannesburg, South Africa, are desirous of representing a milling company in Canada handling flour to South African ports.

1436. Flour.—A firm of manufacturers' representatives in Mexico City desire to secure an agency for a first-class Canadian brand of white flour. Correspondence in English.

1437. Apples.—A manufacturers' representative in Mexico City desires to secure agencies for Canadian exporters of apples in boxes.

1438. Canned Lobster and Canned Salmon.—A firm of manufacturers' representatives in Mexico with good connections desire to obtain agencies for Canadian canned lobsters and canned salmon. Correspondence in English.

1439. Canned Fish.—A firm of importers of foodstuffs and general groceries in Tampico, Mexico, desire to secure the representation for Canadian packers of canned salmon, canned lobsters and other canned, smoked and dried fish products. Would also be interested in canned foods of other descriptions. Correspondence in English or Spanish.

1440. Store Cattle.—A firm of cattle auctioneers located at a centre in the south of England, which they claim is particularly suitable for distribution, ask to be placed in touch with Canadian firms who will be exporting store cattle.

1440a. Lobster, Pilchards, Condensed Milk, Dried Apples, and Sugar.—A French firm want to act as agents for Canadian exporters of the above goods, which must be of A1 quality.

Miscellaneous

1441. Celluloid and Automobile Top Material.—A firm in Sydney, Australia, are desirous of communicating with Canadian exporters of automobile top material, 34 ounces, 50 to 60 yards to a roll, and celluloid for side curtains. Quotations to be made per pound, 50 by 20.

1442. Asbestos (Crude and Fibre).—A London company of asbestos manufacturers are always open to consider offers of Canadian crude and fibre asbestos.

1443. Hardwood Flooring.—A long-established manufacturers' representative in Mexico City, with good connections, desires to secure the agency for a Canadian manufacturer of hardwood mosaic flooring. Catalogues, export price lists, and suggested terms and conditions requested with first letter. Correspondence in English.

1444. Wood Blanks for Rulers.—A Birmingham firm of stationers' hardware and sundries are desirous of receiving quotations for dry birch or white maple blanks for school rulers; sizes $12\frac{1}{2}$-inch by $1\frac{3}{16}$-inch by 6-mil. and $12\frac{1}{2}$-inch by $1\frac{1}{16}$-inch by $5\frac{1}{2}$-mil. Initial quantities desired, 500 to 1,000 gross.

1445. Canadian Hemlock and Spruce.—A firm in Plumstead, South Africa, desire to open up correspondence with a Canadian exporting firm handling Canadian hemlock and spruce, and arrange details of terms by mail.

1446. Box Shooks.—An association of fruit growers in Cape Town are in the market for 50,000 lots of box shooks according to the following specifications. (All figures refer to outside measurements in inches, with the exception of those for depth, which apply to actual inside space.) Deciduous fruits: $1\frac{3}{4}$ by 12 by 18; 2 by 12 by 18; $2\frac{1}{4}$ by 12 by 18; $2\frac{1}{2}$ by 12 by 18; $2\frac{3}{4}$ by 12 by 18; 3 by 12 by 18; $3\frac{1}{4}$ by 12 by 18; $3\frac{1}{2}$ by 12 by 18; 4 by 12 by 18; $4\frac{1}{2}$ by 12 by 18; 5 by 12 by 18; $5\frac{1}{2}$ by 12 by 18; 6 by 12 by 18. Apple boxes: $19\frac{1}{2}$ by 12 by $10\frac{1}{2}$; 24 by 12 by 8. Orange boxes: 26 by 12 by 12. All to be complete with cleats in white wood smoothly sawn, free from knots, well seasoned. Sides to be $\frac{1}{8}$-inch shallower than ends. Tops and bottoms $\frac{3}{16}$-inch thick; sides up to 6-inch, $\frac{3}{16}$-inch thick; ends up to 4-inch, $\frac{9}{16}$-inch thick; ends over 4-inch, $\frac{5}{8}$-inch thick. Apple boxes and orange boxes rather heavier.

1447. Hardware Lines.—A Manchester firm of buying agents wish to hear from manufacturers of hardware lines anxious to establish connections in the North of England.

1448. Machine Tools.—A Manchester firm of buying agents wish to hear from manufacturers of machine tools anxious to establish connections in the North of England.

1449. Sole and Upper Leather.—A London firm are prepared to import Canadian sole and upper leather, either as buyers or agents.

1450. Elastic Webbing and Leather Fittings for Suspenders.—A firm in Hawthorn, Melbourne, would like to hear from Canadian manufacturers of elastic webbing and leather fittings for suspenders, the webbing in all qualities from 1-inch boy's up to silk and for French style; leather fittings for police style. Would like to receive samples and prices.

1451. Paper.—A Birmingham company desire quotations or agency for Canadian M.G. kraft suitable for wrapping. Initial quotations on 10-ton basis required.

1452. Paper.—A Birmingham firm desire quotations for newsprint off cuts in lots of 6 to 7 tons. This company is also interested in sulphite tissues.

1453. Schist Tar.—An important French firm wish to be put in touch with Canadian exporters of schist tar; prices c.i.f. French port if possible.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From St. John

To London.—Bredon, Canadian Pacific Steamships, Ltd., April 5; Canadian Leader, Canadian Government Merchant Marine, April 7; Brant County, I.C. Transports, Ltd., April 11; Bosworth, Canadian Pacific Steamships, Ltd., April 18.

To London (via Halifax).—Lexington, Furness Line, April 12; Ariano, Furness Line, April 24.

To Manchester (via Halifax).—Manchester Producer, Manchester Line, April 14; Manchester Corporation, Manchester Line, April 26.

To Liverpool.—Montcalm, Canadian Pacific Steamships, Ltd., April 6; Canadian Explorer, Canadian Government Merchant Marine, April 11; Montclare, Canadian Pacific Steamships, Ltd., April 20; Marloch, Canadian Pacific Steamships, Ltd., April 27.

To Cardiff and Swansea.—Canadian Navigator, Canadian Government Merchant Marine, April 18.

To Glasgow.—Canadian Voyageur, Canadian Government Merchant Marine, April 7; Marburn, Canadian Pacific Steamships, Ltd., April 19.

To Glasgow and Avonmouth.—Cabotia, Cunard-Anchor-Donaldson Line, April 26.

To Hull (via Halifax).—Lexington, Furness Line, April 12; Ariano, Furness Line, April 24.

To Southampton.—Minnedosa, Canadian Pacific Steamships, Ltd., April 7; Melita, Canadian Pacific Steamships, Ltd., April 21; Empress of Britain, Canadian Pacific Steamships, Ltd., April 24.

To Belfast, Dublin, Londonderry and Cork.—Dunaff Head, Head Line, April 10.

To Antwerp.—Minnedosa, Canadian Pacific Steamships, Ltd., April 7; Melita, Canadian Pacific Steamships, Ltd., April 21.

To Rotterdam.—Brant County, I.C. Transports, Ltd., April 11.

To Hamburg.—Grey County, I.C. Transports, Ltd., April 3; Hastings County, I.C. Transports, Ltd., April 21; Empress of Britain, Canadian Pacific Steamships, Ltd., April 24.

To Havana.—A steamer, Nagle & Wigmore, April 15 and 25.

To Bermuda, Barbados, Trinidad and Demerara.—Berwyn, Canadian Pacific Steamships, Ltd., April 7.

To Havre and Hamburg.—Grey County, I.C. Transports, Ltd., April 3; Hastings County, I.C. Transports, Ltd., April 21.

To Australia and New Zealand.—Atholl, New Zealand Shipping Co., April 25.

To Rio de Janeiro, Santos, Montevideo and Buenos Aires.—Halizones, Houston Line, April 8.

From Halifax

To Liverpool and Queenstown.—Regina, White Star-Dominion Line, April 2; Canada, White Star-Dominion Line, April 8; Laconia, Cunard-Anchor-Donaldson Line, April 9; Megantic, White Star Line, April 22.

To Plymouth, Cherbourg and London.—Ausonia, Cunard-Anchor-Donaldson Line, April 5; Antonio, Cunard-Anchor-Donaldson Line, April 23.

To Bermuda, British West Indies, and British Guiana.—Royal Mail Steam Packet Co., April 30, and every fortnight thereafter.

To Glasgow.—Saturnia, Cunard-Anchor-Donaldson Line, April 6; Cassandra, Cunard-Anchor-Donaldson Line, April 16.

To St. John's (Nfld.).—Belvernon, Tri-National SS. Corporation, April 3; Sable I., Farquhar Co., Ltd., April 7.

To Bermuda, Nassau, Jamaica and British Honduras.—Canadian Fisher, Canadian Government Merchant Marine, April 12.

To Australia and New Zealand.—Canadian Miller, Canadian Government Merchant Marine, April 20.

To Barbados, Trinidad and Demerara.—Canadian Logger, Canadian Government Merchant Marine, April 7.

From Vancouver

To Yokohama, Kobe, Moji, Shanghai, Manila and Hong Kong.—Hawaii Maru, Osaka Shosen Kaisha, April 4; President Grant, Admiral Oriental Line, April 8; Alabama Maru, Osaka Shosen Kaisha, April 19.

To Yokohama, Kobe, Nagasaki, Shanghai, Manila and Hong Kong.—Hawaii Maru, Osaka Shosen Kaisha, April 4.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Asia, Canadian Pacific Steamships, Ltd., April 19.

To Yokohama and Kobe.—Toyama Maru, Nippon Yusen Kaisha, April 4; Alabama Maru, Osaka Shosen Kaisha, April 19; Hakata Maru, Nippon Yusen Kaisha, April 30.

To Yokohama, Kobe, Hong Kong and Manila.—Achilles, Blue Funnel Line, April 7; Philoctetes, Blue Funnel Line, April 28.

To Yokohama, Kobe, Shanghai, Manila and Hong Kong.—Stuart Dollar, Canadian Robert Dollar Co., April 15.

To Australian Ports.—Canadian Inventor, Canadian Government Merchant Marine, April 10.

To the Orient.—Canadian Freighter, Canadian Government Merchant Marine, April 30.

To Dairen (Manchuria).—Hawaii Maru, Osaka Shosen Kaisha, April 4; Alabama Maru, Osaka Shosen Kaisha, April 19.

To Honolulu, Suva, Auckland and Sydney.—Makura, Canadian-Australasian Line, April 27.

To Shanghai, Manila, Hong Kong and Singapore.—Harold Dollar, Canadian Robert Dollar Co., April 5.

To Auckland, Lyttleton, Dunedin, Melbourne, Adelaide and Sydney.—Hauraki, Canadian-Australasian Royal Mail Line, May 10.

To London and Liverpool.—Astronomer, Harrison Direct Line, April 15.

From Victoria

To London and Liverpool.—Astronomer, Harrison Direct Line, April 13.

To Yokohama, Kobe, Shanghai, Manila and Hong Kong.—President Grant, Admiral Oriental Line, April 8; President Madison, Admiral Oriental Line, April 20.

To Yokohama and Kobe.—Iyo Maru, Nippon Yusen Kaisha, April 14; Shidzuoka Maru, Nippon Yusen Kaisha, May 1.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Asia, Canadian Pacific Steamships, Ltd., April 19.

PROBABLE DEFICIENCY IN WORLD'S TEA CROPS

In spite of an occasional check, prices of tea in the Mincing-lane market maintain a firm tendency, writes a correspondent of the London *Times Trade Supplement,* and in view of the estimates now to hand of the 1923 crops it is probable that the higher level of quotations which has characterized the markets for some months past will continue.

The consumption of tea in Great Britain and Ireland rose last year to 411,848,000 pounds, but in view of the high prices now ruling it is not expected that this total will be reached in the current year. There is, however, a world increase in consumption, the figures for the United States and Russia showing the greatest expansion. The total world demand this year is estimated at 710,000,000 pounds, and it is expected that for the year 1922-23 production from all sources of supply will amount to about 652 million pounds,—a shortage of about 60,000,000 pounds being thus anticipated.

LIST OF ACTS ADMINISTERED AND PUBLICATIONS ISSUED BY THE DEPARTMENT OF TRADE AND COMMERCE

Copyrights Act (a). Cullers Act. Electricity and Fluid Exportation Act (b). Electricity Inspection Act (b). Electric Units Act (b). Gas Inspection Act (b). Gold and Silver Marking Act. Grain Act. Inspection and Sale Act. Inspection of Water Meters Act (d). Lead Bounties Act. Patent Act (a). Petroleum Bounty Act. Statistics Act (c). Trade Mark and Design Act (a). Timber Marking Act (a). Weights and Measures Inspection Act (d). Zinc Bounties Act.

MISCELLANEOUS

Annual Report of the Department of Trade and Commerce.
Annual Report of Board of Grain Commissioners for Canada.
Annual Report *re* Mail Subsidies and Steamship Subvention.
List of Licensed Elevators, etc.
Patent Office Record (Weekly) (a).
Annual Report of Weights and Measures, Electricity and Gas (d).
Dominion Grain Research Laboratory (1920).
Grain Inspection in Canada (1914).
Rules and Forms of the Canadian Patent Office (a).
Rules and Regulations made by the Board of Grain Commissioners.
Trial Shipments of Wheat from Vancouver via the Panama Canal to the United Kingdom (1918). (Out of print).

PUBLICATIONS OF THE COMMERCIAL INTELLIGENCE SERVICE (e).

Commercial Intelligence Journal, containing Reports of Trade Commissioners and other Commercial Information.
Apple Market Conditions: Reports from the Canadian Fruit Trade Commissioner at Liverpool (periodically).
Canada-West Indies Conference (1920).
Canadian Economic Commission to Siberia (1919).
Fruit Production in Australia (1922).
German War and Its Relation to Canadian Trade (1914).
Indian Empire as a Market for Canadian Products (1922). (Price outside Canada, 35 cents.)
Mexico as a Field for Exports (1921). (Price outside Canada, 35 cents.)
Markets of Jamaica and the Republic of Colombia, Venezuela, and Panama (1922). (Price outside Canada, 35 cents).
Packing for Overseas Markets (1922). (Price outside Canada, 35 cents.)
Report of Special Trade Commission to Great Britain, France and Italy. (French and English) (1916).
Russian Trade (1916).
Tariffs of the British West Indies (in leaflets).
Trade after the War (1916).
Timber Import Trade of Australia (1917).
Trade between Canada and the British West India Colonies (1920).
Trade of the New Countries of South-east Europe (1921). (Price outside Canada, 35 cents.)
Trading Opportunities in Scandinavia (1922). (Price outside Canada, 35 cents.)
Trading with Egypt (1921). (Price outside Canada, 35 cents.)
Trade with Greece (1921).
Trade with South China (1918).
Trading with Spain (1920).
Trading with Switzerland (1922). (Price outside Canada, 35 cents.)
Toy Making in Canada (1916).
West Africa and Its Opportunities for Canadian Trade (1921). (Price outside Canada, 35 cents.)

PUBLICATIONS OF THE BUREAU OF STATISTICS

The following is an abbreviated list of publications of the Bureau of Statistics. For a complete list, see note (c).
Census of Canada (1911). VI Vols., Bulletins, etc.
Census of Prairie Provinces (1916).
Miscellaneous Statistics respecting the following: Criminal; Education; Finance (Provincial and Municipal); Transportation, including railways and tramways, express, telegraphs, telephones, water, etc.; Production, including agriculture, furs, fisheries, forestry, mining and manufactures; Vital (annual and monthly).
Year Book of Canada.
Report of the Dominion Statistician, Annual.
Trade of Canada (Imports and Exports), Annual and Monthly.
Trade (Internal), including grain, livestock, coal, prices, etc.

NOTE.—(a) Applications should be addressed to: Commissioner of Patents, Ottawa. (b) Applications should be addressed to Director Gas and Electricity Inspection Service, Ottawa. (c) Applications should be addressed to: Dominion Statistician, Ottawa. (d) Applications should be addressed to: Director Weights and Measures Service, Ottawa. (e) Applications should be addressed to the Director, Commercial Intelligence Service, Ottawa.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 285 Beaver Hall Hill, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic.

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address, Canadian.*

Australia.

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium.

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil.

E. L. McColl. Address for letters—Caixa Postal 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies.

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China.

J. W. Ross. Address for letters—P.O. Box 300. Office—Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba.

Address: 400 and 401 Teniente Rey 11, Havana. (Post-office Box 1290.) *Cable Address, Cantracom.*

France.

Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany.

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.

Holland.

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Commercial Intelligence Journal

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Trade Commissioner B. S. Webb's Itinerary in Canada
Business Conditions: Australia, Brazil and Belgium
Increased Crops of Cotton and Sugar Cane in India
Notes on the Trade of the United States with India
Chinese Republic as a Market for Rubber Manufactures
Notes on the Market in Argentina for Woollen Goods
Imports of Flour into the Colony of Jamaica in 1922
Trade Inquiries for: Cereals; Flour; Hay; Flax; Linseed Cake; Woodpulp; Paper; Hardware and Tools

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

Printed by F. A. ACLAND, Printer to the King's Most Excellent Majesty

TABLE OF CONTENTS

Commercial Intelligence Journal

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Ottawa — April 7, 1923 — 1001

TRADE COMMISSIONER B. S. WEBB'S ITINERARY IN CANADA

Mr. B. S. Webb, Canadian Trade Commissioner in Buenos Aires, is now in Canada and has begun his business tour throughout the Dominion. The first part of his itinerary is as follows:—

Winnipeg	April 9
Toronto	April 12 to 20
Owen Sound	April 23
Guelph	April 25
Kitchener	April 26
Stratford	April 27
Sarnia	April 28
Windsor	April 30 to May 1
London	May 2
Woodstock	May 3
Brantford	May 4
Galt	May 5
Niagara Falls	May 7
Welland and St. Catharines	May 8 to 10
Hamilton	May 11 to 15

The second part of Mr. Webb's itinerary will be published later.

Firms in Toronto and Winnipeg who desire to be brought in touch with Mr. Webb or to interview him should direct their communications to him care of the Canadian Manufacturers' Association or the Secretary of the Board of Trade in these cities, and in the case of Hamilton to the Secretary of the Chamber of Commerce in that city. In all other cities and towns included in the itinerary requests for interviews should be addressed to the Secretary of the local Chamber of Commerce or Board of Trade.

EXCHANGE AND BUSINESS CONDITIONS IN BRAZIL.

Mr. E. L. McColl, Canadian Trade Commissioner in Rio de Janeiro, cables under date April 1, 1923, as follows regarding exchange and business conditions in Brazil:—

"There is little possibility of exchange rising until Government valorized coffee is exhausted, as sales exclude foreign bills from market; also regular heavy buying of foreign exchange forces milreis down. Owing to the protective effect of the low milreis, national industry is flourishing, many factories working overtime, while foreign firms dependent on importation report business as very slack."

RUSSIA TO INSPECT FLAX EXPORTS

Inasmuch as foreign countries demand only high grades of flax, a special commission, according to *Economic Life*, has been formed in Soviet Russia for the inspection of flax intended for export. Low grades are to be kept, and only flax meeting the State standard is to be exported.

AUSTRALIAN FINANCIAL CONDITIONS

Trade Commissioner D. H. Ross

Melbourne, February 27, 1923.—The total public debt of the Commonwealth Government (as apart from the State debts) on December 31, 1922, was £513,650,844, of which amount war loans and expenditure in repatriation, etc., formed no less than £365,202,487. During the six months ended in December the Federal public debt decreased by £2,419,665. One of the first important measures to be considered by the new Government, which came into office on February 9, will be the redemption of the 5 per cent loan of £38,723,950 due on September 15 next. At this date, the financial resources of the Commonwealth are particularly strong as the Treasury not only carried forward on January 1, substantial credit balances, but the customs revenue continues to be buoyant—exceeding the estimates—while expenditure has shown some contraction.

Conditions in the London money market have recently been so favourable that the Government of the State of Victoria were able last week to arrange for a new loan of £5,000,000. It was underwritten at £99 10s. and has already been oversubscribed. Including redemption, the return to investors will be £5 1s. 5d. per cent if the loan is repaid in 1932 and £5 0s. 10d. per cent if repaid in 1942. The terms are stated to be better than those secured in London by any Government in recent flotations. A portion of this money will be expended on the extensive plant and installation of the State-owned electricity development from the huge deposits of brown coal at Morwell, some ninety miles from Melbourne. South Australia is securing new capital for public works and other expansion, to the extent of £2,000,000, chiefly through domestic channels. It is anticipated that New South Wales will shortly float a loan of some magnitude in London, where there now appears to be an accelerated demand for investment securities.

In Melbourne to-day, Montreal conversion of the £1 sterling was quoted at $4.79 and at New York the rate was given at $4.71½. The market improvement in conversion rates in recent months has caused the landed costs in Australia of Canadian and United States goods and products to show an appreciable reduction.

In exports of Australian wheat and flour the market is now extremely depressed through the lack of oversea orders. Cables received in Melbourne to-day from London and Egypt indicate that no immediate revival is anticipated in these respective markets. There is, however, a fair demand for shipments to South Africa, and those to the Orient are almost equal to their usual level. Wheat is today above London parity, and at this date it is not possible to purchase free alongside quay for less than 5s. 3d. ($1.28) per bushel. This price is attributed to both lack of supplies offering, and to a continued period of dry weather. Flour of standard quality, in sacks of 150 pounds, has declined to nominally £10 2s. 6d. ($49.27) f.o.b. per ton of 2,000 pounds. The principal flour mills are working only part time. Owing to the protracted absence of rain, there is a strong demand for such by-products as bran and sharps for stock-feeding in country districts.

The trading position shows little variation, but the influence of the high prices realized on wool and butter is reflected in the country districts, despite the somewhat unfavourable climatic conditions. While no losses of sheep and cattle are reported, yet—over a very considerable area of the settled portions of the Commonwealth—a generous rainfall would alleviate present apprehensions of drought conditions.

With the uncertain weather outlook, importers have an anxious time in estimating their probable requirements, and while the volume of orders going oversea is of considerable magnitude, yet there is little trading buoyancy, and an almost entire cessation from speculative buying. Under these circumstances, it is particularly hard to interest buyers in a new line of goods and products.

State-owned and operated industries in Australia have not proved a financial success, and, as opportunities occur, they are either being sold or permanently closed. The timber mills of the New South Wales Government recently ceased operations, while their extensive fleet of fish trawlers and plant can be obtained for a reasonable offer. The Commonwealth Government is also closing its harness factory, and tenders are called for their extensive woollen mills, both of which were operated for the supply of equipment for military and naval purposes.

In Australian industrial activities the most pronounced feature in recent weeks has been the resumption of operations—after a long cessation—of the Broken Hill steel plant at Newcastle, N.S.W. Temporary concessions in customs duties conceded to importers—under the special circumstances of no domestic supplies being available—have been withdrawn, and now the ordinary duties, as outlined in the tariff, are imposed on iron and steel products. The position of merchants and manufacturers is at the moment most uncertain, as while they have some assurance that they will be able to obtain a portion of their requirements from the two steel plants in New South Wales, they are in doubt as to what the particular lines of early production will be. The furnaces at Newcastle have been lighted, and coal and labour rates are to an extent adjusted although admittedly neither are upon the basis the companies hoped for. The result of the reopening of the plants has been a marked curtailment in the placing of orders oversea, and in this regard Canadian and other steel works, which have been exporting to the Commonwealth, must for the time being at least anticipate a falling off in the Australian demand.

The first session of parliament of the new Commonwealth Government opens in Melbourne tomorrow, but it is anticipated that it will be extremely brief, primarily in order to comply with the conditions of the Electoral Act. An adjournment will likely be made for several months to give the Government an opportunity to formulate its policy. Financially, the new administration is in an exceptionally strong position with large credit balances in the Treasury and continued buoyant customs and revenues.

Under the existing climatic conditions, it is impossible to forecast the trading outlook, but engagements are reported as being met promptly and trade generally is upon a sound basis.

LOCOMOTIVE CONSTRUCTION IN NEW ZEALAND

The New Zealand Government, says the Wellington correspondent of the London *Times Trade Supplement*, had contracted with British manufacturers for forty-five locomotives, and almost all of them had been delivered when the last instalment was lost in a wreck.

Construction of locomotives in the Dominion itself is being carried out at the Government's own shops at Addington, in South Island, and at an engineering works at Thames, in North Island. The price of these engines is, however, higher than that of those being made in Great Britain. The contract price for the Thames engines, of which sixteen have yet to be delivered, is about £11,000 each, while those being built by the Government will cost in the ship £8,000 each. Engines under construction in the Government shops will take two years to complete.

COMMERCIAL NOTES FROM NEW SOUTH WALES

Commercial Agent B. Millin

Timber Imported into New South Wales, 1922

Sydney, March 1, 1923.—The total value of timber imported into New South Wales for the year was £1,478,171, included in which was 11,224,800 superficial feet of rough, dressed and undressed timber (mainly softwoods) valued at £1,471,521. The largest item in import was "Timber undressed, n.e.i., in sizes 12 inches by 6 inches and over," viz. 37,622,000 superficial feet, valued at £414,540. Following are the details of timber imported:—

	Superficial feet.
Timber undressed, in sizes 12x6 inches and over	37,622,002
Timber undressed, in sizes 7x2½ inches and over	25,656,979
New Zealand white pine and rimu	24,616,824
Timber dressed and cut for doors, boxes, etc	1,334,403
Logs not sawn and spars in the rough	3,158,910
Timber in sizes of 7x2½ inches or its equivalent and upwards, and less than 12x6 inches or its equivalent, undressed	8,314,506
Timber dressed, N.E.I	7,463,135
Laths, N.E.I	1,433,436
Staves, undressed	1,496,183
Timber for doorstocks, undressed	1,154,381
Veneers and three-ply	667,319

Carbonizing New South Wales Wools

A fair proportion of the wools which come on to the Sydney market is burry, and before it can be used it must be carbonized—that is, the vegetable matter must be removed without injury to the fibre of the wool. Burry wool is cheap and carbonizing adds pence per pound to its value. Hitherto the wool so affected has been bought up cheaply on the local market, has been shipped abroad, and after carbonization in Great Britain, France, or Belgium as the case may be, has been resold at a handsome profit. Steps are now being taken to establish works in the State of New South Wales which will be capable of carbonizing up to 3,000,000 pounds of wool per year.

The works will also be used to desuint and scour fleece wools and to resuint and scour all classes of skin wools. Desuinting is a cold-water scouring of fleecy wools whereby the natural potash in the wool is dissolved and actually does 75 per cent of the scouring without the use of chemicals or hot water, leaving only 25 per cent of the foreign matter, together with grease, to be removed in the scouring; resuinting is the replenishing of skin wool with the natural lubricant which is obtained from the greasy wools, producing a more lofty and supple wool with a greater market value.

Nauru and Ocean Island Phosphate Deposits

It is estimated that at Nauru and Ocean Island, 2,200 miles from Sydney, there are available 100,000,000 tons of some of the highest grade phosphate known to exist. The islands are administered by a joint commission representing the Commonwealth of Australia and the British and New Zealand Governments, as fixed at the Peace Conference. Nauru was formerly a German possession.

The export of phosphates from these islands has progressed very rapidly during the last twenty years. While in 1900 the total export was 25,000 tons, the yearly shipments are now approximately 365,000 tons, of which Australia

takes in the neighbourhood of 265,000 tons. As one ton of phosphate makes nearly two tons of superphosphate after being treated and mixed with sulphuric acid, it follows that Australia uses 500,000 tons of superphosphates per annum.

The present delivered price of the raw material in the Eastern States of Australia is 49s. 3d. per ton. This price is 3s. greater than that charged prior to the outbreak of war, but freight charges have increased by 5s. to 6s. per ton.

Loading takes place in open roadsteads which are at the mercy of the weather and the phosphates are transhipped from small lighters. It is, however, proposed to construct a cantilever jetty from the islands for loading purposes, and this will materially reduce the cost of handling.

New South Wales State Trawling Industry Closing Down

The New South Wales State Government has decided to close down the State trawling industry which was established in 1915. Operations were commenced with three trawlers purchased in England, and later on four more were built at Newcastle, N.S.W., at very considerable cost over what they will now sell at. While the quality of fish obtainable could not be described as first class, it was very plentiful and in fair demand by consumers, although at times considerable quantities left over were dumped at sea.

The industry has, however, been a losing one all the time, the accumulated deficit up to the end of last year amounted to the large sum of £227,000. Recent losses average the sum of £1,000 per week. The Government has therefore decided to close the industry and the trawlers and plant are for sale.

New Engineering Works at Sydney

Messrs. Babcock & Wilcox, Limited, recently opened at Regents Park, ten miles from Sydney, new works which will eventually cover an area of 20 acres and give employment to at least 1,000 hands. The works will be engaged on the company's complete range of manufactures, comprising water-tube boilers, mechanical stokers, pumps, water heaters, steam piping, structural steel work, steel chimneys, electrical cranes, water softeners, suction gas plants, and general power-house accessories, including conveyers for coal and for other material.

Australian Sugar Yield

The cane crop in Queensland for the season 1922 is expected to be approximately in the vicinity of 2,194,712 tons. This will not be so heavy a cane average per acre as in 1921; on the other hand, an increase in the sugar content of the cane is anticipated.

The production in New South Wales for 1922 should be about 17,000 tons, about the same as last year. This added to the Queensland crop, will give 305,000 tons of sugar for Australia, which will again be a surplus over consumption.

INCREASED CROPS OF COTTON AND SUGAR CANE IN INDIA

Trade Commissioner H. A. Chisholm

Calcutta, February 23, 1923.—It is now practically assured that agriculturally the season of 1922-23 will prove to be one of the best in India's history. Mention was made in a recent issue of this journal of the excellent prospects for a large wheat crop [see No. 998: March 17, 1923]. A favourable rice year is also now assured. The jute crop may not prove to be as favourable as last year's owing to very heavy rains, but jute affects only one corner of India. On the other hand, large yields of both cotton and sugar cane are now indicated in the estimates of the Government of India.

16 PER CENT INCREASE IN COTTON YIELD

The Final General Memorandum on the Indian Cotton Crop of 1922-23 published by the Government of India estimates the total yield at 5,196,000 bales of 400 pounds each, which is 16 per cent above the revised estimate of yield for the previous season. The total area under cotton is placed at 21,119,000 acres, or 14 per cent above the revised figure of last year. High prices at sowing time are said to be largely responsible for the increased acreage, while favourable weather conditions are responsible for the increased yield.

This year's yield is one of the largest in the history of the country, being exceeded in recent years only by the 5,796,000 bale crop of 1919-20. The average pre-war yield was 4,368,000 bales. The Bombay Presidency and Central India produce about half of India's cotton crop. The greatest advance over last year was made in Sind, where the yield was doubled on an acreage 66 per cent above that of last year.

India's home consumption of cotton amounted to 2,909,000 bales in 1922, as compared with 2,828,000 bales in 1921, while exports in 1922 amounted to 3,170,000 bales as compared with 2,226,000 bales in 1921. Nearly 70 per cent of India's exports of raw cotton now go to Japan and China.

15 PER CENT INCREASE IN SUGAR PRODUCTION

The increased yield for this year of raw sugar or *gur* will mean that India will be practically independent of foreign sources for her needs. *Gur* is a very important food staple in the diet of the Indian peasant, and when the sugar crop is short India imports several hundred thousand tons of Java and Mauritius sugars.

The official Final General Memorandum on the Sugar Crop of 1922-23 estimates the acreage sown to sugar cane at 2,721,000 acres, an increase of 14 per cent over last year, while the total yield of *gur* or raw sugar is estimated at 2,988,000 tons, as compared with 2,599,000 tons last year and 2,820,000 tons as the average yield for the preceding five years.

FALLING PRICES

Recent months have witnessed a notable fall in the prices of these staple articles of diet of the Indian masses. The index number of wholesale prices in Calcutta of cereals fell to 114 in January, 1923, as compared with 130 in September, 1922, 145 during 1921, 163 during 1920, and 100 in July, 1914; of other food grains to 118 in January, 1923, as compared with 141 in September, 1922, 160 during 1921, 166 during 1920, and 100 in July, 1914; of sugar to 212 in January, 1923, as compared with 220 in September, 1922, 270 during 1921, 407 during 1920, and 100 in July, 1914.

Falling prices of foodstuffs usually have an important retroaction on the political situation in India. When foodstuffs are high priced the Indian peasant finds it difficult to secure enough food for his physical needs and he thus becomes a fit subject for seditious propaganda. On the other hand, when crops are good and prices are low the Indian peasant is generally contented and has little time for political activities. As the year 1922 drew to a close and brought with it an era of rapidly falling prices, little has been heard of unrest throughout the country—in marked contrast from the situation at the beginning of the year.

NOTES ON UNITED STATES TRADE WITH INDIA

Trade Commissioner H. A. Chisholm

DECLINING EXPORTS

Calcutta, February 22, 1923.—The United States is the only great industrial county whose export trade to India showed a serious falling off in 1922 as compared with 1921. While the total values of British and Japanese exports to India in 1922 declined very slightly as compared with 1921, American exports (according to statistics published by the Government of India) declined in value from a little over 17 crores* of rupees or roughly $50,000,000 during the nine months April-December, 1921, to 10½ crores of rupees or roughly $32,000,000 during the corresponding nine months of 1922. Meanwhile German trade had nearly doubled in value, that of Belgium had increased over 30 per cent, Norway, Sweden, Switzerland, Italy, and Canada had slightly increased their respective quotas, and French and Dutch trade showed only small percentage decreases in value.

Detailed statistics of India's foreign trade are not yet available for the calendar year 1922, but comparisons drawn between the official statistics of the fiscal year ending March, 1922, and those of the previous fiscal year, will show the general trend of the Indian market for American goods. Where the term "last year" is used in this report it refers to the fiscal year ending March 31, 1922.

COMMODITIES WHICH ARE IMPORTED

Arms and Ammunition.—By maintaining salaried representatives in India, two or three American manufacturers of sporting arms and ammunition have managed to maintain a profitable trade in competition with British manufacturers.

Apparel.—Very little ready-made apparel is imported into India. American manufacturers, however, are doing a small but steady business in cotton underwear and hosiery appealing to the better class trade. The bulk of India's imports of hosiery are from Japan.

Belting.—There is a good demand in India's 250-odd cotton mills and 70 jute mills for cotton, leather, rubber and coir belting. The total value of belting imported into India is in the vicinity of 1½ million dollars a year, of which nearly 90 per cent originates in the United Kingdom and most of the remainder in the United States—chiefly high quality leather belting.

Boots and Shoes.—In 1919-20 several hundred thousand pairs of shoes were imported, over half of which were American. In 1921-22 only 12,000 pairs of American shoes were imported as against 68,000 pairs of English shoes. Shoes are now shipped only for the high-class trade, as several Indian shoe factories are turning out goods which are retailed at an average price of from $1 to $2 per pair. Although the vast majority of the population of India is barefooted, the habit of wearing shoes is gaining headway, particularly in the cities. American styles of shoes are rather popular with Indians, but they are now too high priced.

Clocks and Watches.—After the war the United States sold a great many clocks and watches to India, but Switzerland now has the bulk of this trade. India offers a big market for cheap watches and alarm clocks, as every Indian who can afford one is a buyer.

* A crore of rupees is equal to roughly $3,000,000. A lakh of rupees is equal to roughly $30,000.

Cutlery.—American trade in this line has almost disappeared. Good-quality cutlery is imported from the United Kingdom, while Germany monopolizes the cheap trade.

Dyes.—The bulk of this trade is German, but the United States does a specialty trade in dyes now worth from ten to twenty thousand dollars a month.

Hardware and Tools.—In 1920-21 the United States sold more builders' hardware to India than either Great Britain or Germany. Last year, however, the United States trade dropped to only half that of Great Britain, while Germany's trade had increased. Swedish tools are now making a successful entry into the Indian market. Unless American prices are reduced, the United States will drop to fourth or fifth place in this market. American exports of domestic hardware to India last year amounted in value to only a fifth of that of the previous year. British goods have the best of the market, with Germany second. American prices are now much out of line. The American trade in implements and tools is holding up fairly well. The American Dietz lamp still controls the Indian market. Between 150,000 and 200,000 metal lamps and lanterns are sold monthly in India. A very limited trade is being done in American agricultural implements.

Electrical Instruments and Apparatus.—The United States still keeps second place in this trade after Great Britain, although German, Italian, Swiss and Swedish sales are increasing rapidly. The American trade in electric wires and cables, electric fittings and switch-boards has fallen off heavily. A certain trade is being maintained, however, in telegraph and telephone apparatus, batteries, accumulators, motors, dynamos and transformers. There is an increasing demand for electrical goods in Indian owing to the popularity of the electric drive in Indian mills and extensions in the installations of electric power.

Machine Tools.—During 1921-22 the United States trade in machine tools doubled in value over the preceding year to some two million dollars. The British trade was worth some four million dollars, while Denmark occupied third place.

Machinery.—Sales of American mining machinery—chiefly coal cutters—are increasing and American interests are actively represented in this line in India. The United States did some trade after the war in boot and shoe machinery for India, but the United Kingdom now does most of this business. It is said that the United States supplies about a third of the oil seed machinery used in the Peninsula. A large market exists for rice and flour mill machinery, most of which is British. The American trade here is small and occupies third place after Germany. In 1921-22, rice mill machinery to the value of over two million dollars was imported. The United Kingdom controls the huge Indian market for cotton machinery. The United States total shipments of machinery and millwork to India in 1921-22 amounted to about one-seventh of those of the United Kingdom, which was worth some $90,000,000 in that year. In a country like India, where engineering practice and standards are entirely British, there would appear to be very little chance for American machinery and millwork.

Metals.—American exports of brass and bronze dropped to very small quantities last year. The United Kingdom's trade also fell off, while imports from Belgium and Germany increased. The United Kingdom and Germany supply most of the yellow metals, but the American trade in wrought copper increased considerably last year, as compared with the previous fiscal year. Imports of American iron and steel goods continue to fall off to comparatively small proportions except in galvanized sheets, wrought and cast pipes and

fittings. The United States, however, continues to be in the market from time to time in hoops and stripes, wire nails, fencing wire, and bolts and nuts. In all iron and steel lines, however, the United Kingdom and the Continent have by far the greater portion of the trade.

Motor Vehicles.—Importations of the American type of passenger motor car constitute from 70 to 80 per cent of total numbers brought into the country. Prices of the more popular makes of cars built in Canada and the United States for the Indian market continue to show sharp reductions. The leading motor car manufacturers now have built up efficient organizations for distribution and service throughout India, and it is practically useless for a new competitor to enter the market successfully at this stage. It is probable that from 50 to 60 per cent of the motor cars now being imported into India are made in Canada.

Oils.—About 80 per cent of the kerosene oil used in India is from the United States; also a large proportion of the lubricating oils is imported. Most of the fuel oil is imported from Persia, while the petrol is supplied from Burma.

Paints.—Nearly all the paints used in India come from the United Kingdom, and the American share of this trade has fallen off to very small proportions.

Paper Goods.—The United States trade in paper products dropped last year to a seventh of that of the previous year. A little American packing paper and writing paper still enters India, but this represents a very small proportion of the total importations. The finer grades of paper are mostly British, while the coarser grades are Continental. American paper prices are at the present time too high for this market.

Rubber Tires.—French tires now lead in the Indian market, with British tires second and American third. Importations of tires in 1922 show a 40 per cent advance over the previous year. Three or four well-known American brands of tires are now being extensively advertised in India. At least one of these brands is made in Canada for the Indian market.

Textiles.—Great Britain has the bulk of the great piece-goods trade of India, and Manchester's only serious competition is offered by the Indian mills in the cheaper counts and to a small extent by Japanese mills. A few million yards of American grey shirtings continue to be sold in India, and at the present time these are said to be offered in India at lower prices than those asked for similar Manchester goods. Importations of American grey shirtings increased last year over the previous year, and it is thought that if American mills could put a little more finish on these shirtings and keep them at their present prices, they would offer Manchester some serious competition.

Typewriters.—The United States almost monopolizes the typewriter trade in India. Two or three well-known American makes of typewriters have maintained very efficient organizations which push sales most actively. On the other hand no British typewriter is supported by active sales methods in India.

Wood and Timber.—During the past year several hundred thousand American and Canadian creosoted Douglas fir sleepers were sold to the Indian railroads on account of the difficulty they had in securing native hardwood sleepers at reasonable prices. It is not probable that more than 10 or 15 per cent at the most of India's annual requirements of sleepers would be purchased outside India and Burma. The most recent contract placed by Indian railroads for foreign sleepers went to Australia for jarrah wood.

JAMAICA'S FLOUR IMPORTS IN 1922

F. L. Casserly, Office of Trade Commissioner

Kingston, March 21, 1923.—The imports of flour into Jamaica during the period from the 1st January to the 30th September, 1922 are given by the Customs Department as follows:—

	Bags of 196 lbs.
From United States	126,726
From Canada	74,032
From Other Countries	14
Total	200,772

Returns for the last quarter of 1922 are not yet available, but taking as the imports for that period the average for the first three quarters, the figures for the whole year, compared with those for 1921, stands as follows:—

	Bags of 196 lbs.			
	1922	Percentage	1921	Percentage
From United States	168,968	63	188,440	75
From Canada	98,709	37	61,891	25
From Other Countries	18	fract.	54	fract.
Total	267,695		250,385	

It should be noted that the figures for the first three quarters of 1922 cannot be considered absolutely correct, since the Jamaican Preferential Tariff did not come into force until the first week in April of that year. Prior to that date, the Jamaican Customs authorities were in the habit of crediting Canadian imports via the United States to the latter country, no certificate of origin being demanded of importers. Thus the official returns show only 33,163 bags of flour to have been imported from Canada in 1921, whereas, from information supplied by the Dominion Bureau of Statistics, the correct figure was found to be 61,891, or a shortage of about 28,000 bags for that year. Assuming, as is highly probable, that the returns are also incomplete for the first quarter of 1922, and ignoring the higher grand total for last year, it follows that to arrive at an approximate estimate of Canada's share of the trade in 1922, 7,000 bags should be added to the Jamaican official figures; this would bring imports from Canada for the first three quarters up to 81,032 bags, and for the entire year to 105,709 bags or roughly 40 per cent of the whole. This, however, is probably a conservative estimate, because, as will be shown later in this report, the flour trade with Canada showed increased activity during the last three months of 1922—an increase the extent of which unfortunately cannot at present be estimated.

INCREASE IN TRADE WITH CANADA

These returns will be of great interest to Canadian exporters, for the Dominion's increased share of the trade in 1922 points to a growing preference on the part of the Jamaican consumer for Canadian flour, and would seem to indicate that the latter will in time dominate the Jamaican market, just as it does in other British West Indian colonies.

The reason for this change may be summed up in two words—quality and price. In response to the ever-growing improvement in public taste, local bakers are realizing more and more than Canadian hard wheat flour is the best procurable, because it yields more dough and gives a better quality of bread; with the result that several large bakeries which in the past have pinned their faith upon the extreme whiteness of American patents will now have nothing but

Canadian hard wheat flour. Thus Canada bids fair to control the demand for the best grades, her only competitors in this direction being a few American millers in the Minneapolis district who sell practically all over the world, and whose products and business experience represent a high level of milling experience. These American flours (the sales of which aggregate about 30,000 bags yearly), retain their hold upon the market not because they are better than, or even as good as Canadian hard patents but because of the superior sales service and general business methods of the American mills; and it seems fairly obvious that if Canadian exporters make a serious attempt at improvement in this direction, they may legitimately expect an increased custom in such flours.

As regards first and second clears—or "counter-flour" and "shop-flour" as they are respectively known in Jamaica—these supplies, which are used by the poorer classes for coarse loaves and cakes, and account for about 30 per cent of the Jamaican demand, are at present almost exclusively American. As Canada produces comparatively little soft wheat, there is no immediate prospect that she will be able to compete successfully in this trade.

CANADA HAS ADVANTAGE IN PRICE

It is gratifying to report that during the latter half of 1922 Canadian quotations for hard wheat flours were on the whole lower than American. On this account, large importers who are accustomed to draw their supplies from both countries bought more than is customary from Canada and less from the United States during that period. As an instance, the largest flour distributor in Jamaica was obtaining about even quantities from both countries in July last; but in August he imported 70 per cent of his supplies from Canada; in September 67 per cent; in October 90 per cent; in November 70 per cent; and in December 80 per cent. It would therefore seem probable that Canadian sales during the last quarter were considerably above the average for the first three quarters of the year, and that consequently imports from the Dominion for the whole year exceeded the estimate of 105,709 bags given above.

The preference of 1s. (23 cents) per bag which Canadian flour enjoys in the Jamaican market is undoubedly partly responsible for the increase in Canadian business during the year under review.

The following comparison between the prices c.i.f. Kingston, Jamaica, per bag of 196 pounds, of Canadian and American flours, during the period from July, 1922 to January, 1923, is from figures supplied by one of the large importers in Kingston, who are in the habit of closely following the trend of the flour trade.

	Canadian Hard Wheat	American Fancy Patent	American First Clear Winter Wheat ("Counter Flour")	American Second Clear ("Shop Flour")
July, 1922	$6 85	$7 30	$5 20	$4 75
August, 1922	6 85	6 90	5 20	4 55
September, 1922	5 85	6 50	5 20	4 35
October, 1922	5 85	6 50	5 20	4 35
November, 1922	5 85	6 50	5 20	5 25
December, 1922	7 00	7 00	5 20	5 25
January, 1923	7 00	7 00	5 55	5 25

MARKING OF FOOD IMPORTS FOR THE BRITISH MARKET

A private members' bill has been introduced into the British House of Commons providing for the marking of certain food imports. The following is a summary of the proposed measure:

Section 16 of the Merchandise Marks Act (which relates to prohibition of importation) shall apply to certain agricultural produce, unless these are clearly marked as imported or stamped with the country of origin.

This bill applies to all imported meats, eggs, raw fruit, vegetables or pulp, poultry or dairy produce. Meat is to be clearly stamped except where pieces of meat are customarily imported in a box, barrel or like package, in which case these are to be conspicuously so branded or stamped.

The word "imported" or a clear indication of the country in which the eggs were produced is to be indelibly marked on all imported eggs. In the case of raw fruit, vegetables or fruit pulp, poultry or dairy produce, each box, tin or other package, is to be conspicuously so branded or stamped.

The expression "meat" shall include beef, veal, mutton, lamb, pork, bacon and ham and shall not include canned, cooked or potted meats, or sausages or offals.

As was indicated by Mr. Harrison Watson, Canadian Trade Commissioner, London, in his communication published in last week's issue, it is understood to be the intention of the British Government to introduce a measure which it is expected will widen the scope of the above private members' bill.

IMPORTS INTO NEW ZEALAND FROM CANADA DURING 1922

Mr. W. A. Beddoe, Canadian Trade Commissioner, Auckland, writes under date March 6, 1923, that the total imports into New Zealand from Canada during the calendar year ended 31st December, 1921, as compared with 1922, were as follows:—

Total for year ended December 31st, 1921	£1,582,258	$7,911,290
Total for year ended December 31st, 1922	£1,545,037	$7,725,185
Increase 1921 over 1922	£ 37,227	$ 186,105

The following are the principal increases and decreases:—

Increases	£	Decreases	£
Fish preserved in tins	33,938	Fresh apples	4,198
Rubber heels and soles	4,428	Seeds, grass and clover	3,755
Boots and shoes other	23,798	Apparel and ready made clothing	7,808
Hosiery	10,026	Goloshes and overshoes of rubber, etc	15,219
Cotton piece goods n.e.i.	15,233	Gum boots	3,948
Nails other, inc. dog spikes	12,402	Corsets	28,245
Other tools	4,392	Buttons, tapes, wadding, pins and needles	6,578
Wire, fencing, barbed	18,451	Iron and steel—bar bolt and rod	10,785
Wire, fencing, plain	16,325	Bolts and nuts	11,084
Reapers and reapers and binders	4,029	Hardware, holloware and ironmongery	13,156
Insulated cable and wire	3,930	Wrought iron pipes—6 in. and under int. diam.	89,987
Tools, engineers and metal—wood—glass—stone workers	16,075	Cultivators, spring tine	4,409
Belting other, inc. canvas and rubber	5,375	Drills and sowers	19,962
Leather, japanned and enamelled	4,091	Harrows disc	3,458
Sole pump and skirt, leather	5,054	Ploughs	5,203
Timber, sawn, n.e.i. dressed, other	7,662	Timber sawn, n.e.i. rough, oregon pine	23,999
Doors and sashes	4,167	Cement, building	18,478
Woodenware and turnery n.e.i.	8,013	Paperhangings	36,668
Sensitized surfaces	12,742	Cardboard boxes, materials for, other	6,180
Passenger vehicles other than buses	180,986	Printing paper	99,663
Rubber tires for motor vehicles	28,743	Wrapping paper unprinted	31,319
		Writing, not less than demy	17,762
		Stationery n.e.i.	15,775
		Calcium carbide	8,734

Mr. Beddoe has transmitted a table which he has compiled giving the values in detail under the several headings of imports into New Zealand from Canada for 1922, together with the articles affected by and the value of a Canadian preference. This table is on file at the Department of Trade and Commerce, Ottawa, and may be consulted by interested Canadian firms.

NOTES ON THE ARGENTINE MARKET FOR WOOLLEN AND SILK TEXTILES

Assistant Trade Commissioner P. W. Cook

I. Woollens

The Argentine Republic ranks very high among the wool producing countries of the world, and while the qualities are in some respects less suitable for fine textiles than certain Australian and British wools, yet there are few wool manufacturing countries which do not make use of large quantities of the Argentine product. Indigenous woollen textile industries, however, have not been established to the extent which the great wool production of Argentina would seem to favour. Local manufacture is very limited and has so far resulted in little more than the partial production of the market requirements in the cheaper and coarser fabrics. In this respect Argentina is decidedly behind the neighbouring republics of Brazil and Uruguay. There are about 1,500 small spinning establishments in Argentina with an annual production valued at about $300,000. Apart from wool washing,—the production of which in 1919 was 20,670 tons, of which 13,670 were exported,—the most important factory woollen industry is that of weaving. It was estimated in 1914 that about 20 per cent of the total amount of textiles in the piece consumed in Argentina was of local weave, about 60 per cent of the material for which was imported. Other domestic production is limited to blankets and uniform cloth. Broad goods for men's suitings are turned out in pure woollens and worsteds, generally rather heavy in weight.

Although in the northern districts, bordering on Brazil and Paraguay, the climate of Argentina is subtropical and therefore hot for the greater part of the year, from Buenos Aires South, particularly along the seaboard, it is temperate, and in the extreme south sub-antarctic. Inasmuch, however, as the greater part of the population, and probably 80 per cent of the purchasing power of the country, is limited to the section which includes the cities of Buenos Aires, Rosario and La Plata, it is the conditions that obtain in these districts that are important in any consideration of the import trade in textiles.

The Argentine is most conservative as regards dress. Although generally of Latin stock—chiefly of Spanish or Italian descent—he has none of the southern European's love of colour and pattern. Rather is his taste sombre in the extreme, and his choice of cloth usually limited to navy blues, blacks and very dark greys. The same conservatism applies to his socks, neckwear and general haberdashery. At the same time there are few who are better dressed or more finical as regards material and workmanship than the educated Argentine. Checks, stripes, mixtures other than formal grey, or coloured tweeds and worsteds, find no great demand. Smooth finish is generally preferred. The Argentine women are also very discriminating in their choice of clothing, which is shown in their preference for exact shades and exact designs. In general, styles are modelled on Paris and London. As south of the equator seasons are reversed, designs and patterns fashionable in Paris or London during the European winter are in vogue in Buenos Aires six months later.

YARNS

Until 1915 the import of yarns and yarn mixtures into Argentina was almost entirely from overseas, but since that year the development of the Uruguayan wool spinning industry has considerably lessened the value of this market to overseas shippers. Importation from overseas is at present restricted to the very finest grades only. Imported yarns are used for knitting purposes and are chiefly half or full bloods; principal numbers appear to be 3A, 1/12, 1/30, 1/40, 1/60 in all colours, but whites and greys are in chief demand. The majority of yarns for weaving purposes are locally spun.

BLANKETS

The manufacture of blankets is one of the more developed woollen industries in Argentina, and articles of excellent quality are made both in pure wool and in wool and cotton mixtures. The chief import demand appears to be for high-grade pure wool blankets with edges in silk or other material, but there is also a demand for wool and cotton mixtures silk-edged. The import of rougher quality blankets without bound edges, either in pure wool or wool mixtures, is small, because of the competition of cheap local production and the high protective duty. In 1920 the importations into Argentina of wool blankets edge bound totalled 11,310 kg., of which 6,117 were from the United Kingdom, 3,564 from France, 1,028 from Spain and 293 kg. from the United States.

First quality Canadian all-wool blankets, either white or in two-colour designs on a white base, might do well if in price they were competitive with the equivalent British article. The greater part of the import of blankets is by the railways for service use, or the retail shops, the demand for the imported article existing only among the wealthier classes.

FELTS

The mills in Argentina manufacturing pressed felt do not meet the demand. The most important classes of felt imported are for the manufacture of hats and slippers. There are 81 establishments manufacturing felt hats in Argentina, the aggregate capital of which is nearly $2,400,000 Canadian. Practically all the material used by these industries is imported. Pressed woollen felt for shoe machinery might find a market. Shoemakers' upper felt, black in colour, is imported in pieces of 35 to 40 metres in length and between 140 and 160 cm. in width. The weight in chief demand is 400 grammes per lineal metre. Sole felt, also black in colour, is imported in pieces of 140 and 150 centimetres square and varying from 600 grammes to 900 grammes per square metre. There is a fair demand for roofing felt, carpet felt is rarely used, and the market for insulating felt is unimportant. The importation of felts into Argentina in 1920 totalled 40,104 kg., the principal contributing countries being the United Kingdom (17,344 kg.), United States (12,577 kg.), Spain (7,020 kg.), France (1,714 kg.), and Germany (787 kg.).

CARPETS AND RUGS

During the last ten years the taste in interior decoration and furnishing has greatly changed in Argentina. Prior to the war, Louis XV and Louis XVI styles were in vogue, but to-day English Period and Colonial styles are much more general. Thus the former demand for carpets and rugs modelled on French traditional designs has given place to the more or less standard modern British patterns, or imitations of orientals.

Argentina closely follows the English market, and the majority of imports at the present time are from England. Carpets are entered in 50-yard lengths

and standard width of 5/8, 3/4, 4/4, 5/4, and 6/4. There is a good general demand for all sizes from small mats to about 12 x 15 feet; perhaps the most readily saleable sizes are between 9 feet x 6 feet and 9 feet x 12 feet. Oval types also sell well. With the exception of orientals, rather severe designs and colourings are most in favour. Velvet, Axminster and tapestry squares are chiefly sewn-strip, but the majority of Wiltons are imported in one piece.

All carpets for Argentina should have light-weight backs as importations are dutiable by weight; and the climate is not cold enough for heavy wool backs or very deep pile. Jute carpets sell well in the country districts. Loop pile carpets, such as tapestries, are dutiable at a lower rate than cut pile Axminsters or Wiltons.

PIECE GOODS

Great Britain holds the dominant place in the Argentine market generally and this is especially marked in woollen piece goods. The statistics show that while Spain, France, Italy and latterly the United States, are also large exporters to Argentina, Great Britain has always ranked first and to-day is maintaining her pre-war average.

In 1920 the importation of pure wool piece goods into Argentina aggregated 1,790,950 kg., the following countries being the principal contributors: United Kingdom (1,170,067 kg.), Spain (344,009 kg.), France (118,752 kg.), United States (65,774 kg.), Italy (44,508 kg.), Germany (14,345 kg.), and Belgium (11,073 kg.). In wool and silk piece goods the importations totalled 188,055 kg., shipments from the principal countries being as follows: United Kingdom (154,250 kg.), Spain (23,202 kg.), France (5,902 kg.), United States (1,780 kg.), and Italy (1,654 kg.). In wool mixtures the importations during 1920 reached a total of 1,480,985 kg., the following being the contributing countries in order of importance: United Kingdom (929,691 kg.), Spain (406,656 kg.), United States (84,192 kg.), France (19,303 kg.), Italy (18,346 kg.), Holland (9,144 kg.), and Germany (7,582 kg.),

All piece goods for the Argentine market should be shipped sponged and shrunk and carrying a guarantee that the dyes are firm. The greater widths are preferred, as there is a prejudice against narrower goods as of inferior quality. Half pieces of 50 to 60 yards are easy to dispose of to custom tailors and cutters. The British practice of allowing *gratis* 1 yard in 37, or 1 yard per piece, is one that should be followed. Certain importers like to have the goods they deal in identified by a distinctive selvage. Unless otherwise indicated, all prices quoted in this report are in sterling c.i.f., and are subject to the usual trade discounts.

Overcoatings.—Quiet designs, as has been already indicated, find the readiest market. Any weight from 10 to 26 ounces is saleable. Irish homespuns of 18 to 20 ounces in weight and 58 inches wide are liked, particularly in close weave and smooth finish. Meltons with a deep curly nap, and tweeds and gabardines are in common use particularly in Oxford greys, herringbones and Scottish mixtures. Heavy Irish freize in 22 ounces is also to be seen in the better-class shops. The importation of worsteds is restricted, as fairly good qualities of local manufacture may be purchased at less than the imported article.

Flannels.—The main import of flannels of better qualities is from Great Britain, but Spain supplies a well-established line in cotton mixtures. There is a market for light-weight pure wool shirting flannels in greys, whites and subdued stripes. Grey pure wool flannels for trousers 56 inches in width and weighing about 12 ounces per yard are imported in quantities from England at about 8s.

Serges.—Serge is perhaps the most popular of all suitings and the demand is great. That for men's wear is supplied by Great Britain, but women's serges

and tricotines are also largely imported from France. British serges come in 60-yard lengths, 46 to 56 inches in width, and 9 to 16 ounces in weight. These range in price from 4s. 4d. per yard to 18s. 9d. for the finest grades. The most popular colours are black and three shades of navy blue, of which indigo is in most demand. Cream serges in 54-inch width and in all weights from 10 to 16 ounces per yard are supplied in quantities from Great Britain at a price of 8s. to 22s. The sale for grey serges is restricted.

Homespuns.—For either men's or women's suitings, homespuns are not generally worn. While as mentioned above, Irish homespuns of heavy weight and with little nap are in demand for overcoatings, the finish is generally considered too rough for suits or tailor-mades. While that is so, samples of Canadian factory-made homespuns for women's wear have been shown to several importers, who expressed the opinion that as they were quite different in weave and finish from European homespuns, they might find a sale where the latter do not. In quality they were considered excellent. It must be noted, however, that Canadian homespuns will be regarded as a specialty line hitherto unknown to the market, and as such will require a good deal of display and advertising. An attractive and suitable trade name, dissociated from the term "homespun," would be of value in establishing a demand. Weights should not exceed 16 ounces, and colour and design should be as diversified as possible but not too brilliant.

Tweeds and Worsteds.—For men's suitings these are only second in importance to serges, and are almost entirely of English and Scottish origin. Popular suitings range from 9 to 16 ounces per yard of 56-inch in plain grounds, but also in invisible stripes, herringbones, and mixtures. Worsteds of rough texture approximating those produced by local manufacture are not likely to find a market, as the demand in imported goods is for close weave and smooth nap finish.

Velours.—High-quality velours are in great demand. These should come in not less than 56-inch widths, and ranging between 16 and 20 ounces in weight; the lighter weights are more widely sold. A complete range of colours is required, but the present favoured shades are fawn, beige, and a pale blue-grey. The reverse side of velours should be only slightly napped. Other pile fabrics, such as plushes and velvets, are saleable.

Jersey Cloth.—This is a line in which Canada should be able to compete with good representation. All weights in jersey cloth find a good market, as it is much used in local manufacture. England and France are the present chief sources of supply, and Switzerland for lighter "milanese" jersey cloth. White light-weight jersey cloth is an established line of import, but there is also a good demand for greys and colours. Most importers prefer half pieces of about 50 yards in length and 56 inches in width, rather than full pieces of circular knit. Samples of Canadian jersey cloth submitted to the trade were declared to be of first quality, but rather high in price. Heavier knitted fabrics are made to advantage locally or are imported in the finest qualities only from Great Britain, Germany, and France.

Specialties.—The Argentine trade is always on the lookout for novelty lines of original texture or design, provided they comply with the general requirements of light weight and smooth finish.

WEARING APPAREL

Ready-made Suits.—Local manufacture of ready-made clothing for external use is so highly protected by the Argentine tariff that its importation is practically negligible. The same is true of shirts and overalls.

Woollen Gloves.—There is very little trade in woollen gloves of any kind except in heavy qualities for the country districts of south Argentina, as these are manufactured to advantage locally.

Sweaters and Bathing Suits.—Ladies' sweaters, both pullovers and coat patterns, are made locally, but are also imported from Great Britain and France. Fairly heavy coat sweaters with a deep blanket-like nap in a variety of colours and styles are in fashion, but their total sale appears to be considerably less than that of silk sweaters and jumpers. Only the highest qualities and most fashionable designs would find a profitable sale. There is a certain demand for imported bathing suits, chiefly of jersey cloth, but it is unlikely that Canadian manufacturers could successfully compete with the local product. Woollen scarves and mufflers could only be sold as a novelty line. There is no steady demand for these articles.

Hosiery.—The market for woollen hosiery appears to be diminishing and local manufacture supplies the bulk of the demand. Except among the working classes, wool is not popular for socks or stockings. Men use thread or silk mixtures and women pure and artificial silk. The British and Continental population purchase certain quantities of the high-grade imported woollen article, but the total imports of pure wool hosiery averaged but 12,000 kilos during the past four years as against nearly 35,000 kilos in silk and artificial silk. Cotton hosiery ranks first, but there is certainly a far larger demand for lisle thread than for wool or woollen mixtures.

British woollen hosiery is regarded as highest in quality, but prior to the war the German product, particularly for ladies' wear, was favourably considered, and there is at present every indication that Germany is endeavouring to re-establish her position in this market. Colours in demand are black and dark brown; brilliant shades, greys, whites and patterns are not in favour.

Probably the best opportunities are in children's hosiery, both full and half lengths, particularly in wool mixtures. This is also a line in which German manufacturers did well prior to the war, but a criticism levelled against their products is that they are lacking in elasticity. In children's hose black is the predominating shade, followed by white and brown. The United States appear to be building up a good business in this line, but the finest qualities are said to be of Scottish and French origin. It is probable that in children's hosiery, as in that for adults, local manufacture will make profitable importation increasingly difficult.

Hosiery for the Argentine market should be packed in paper wrappers of six pairs each and marked in both English and Continental sizes. Duties are increased by $1.50 per kilo if hosiery is embroidered or ornamented in any way.

Underwear.—The market for woollen underwear is better than that for hosiery and, particularly during the winter months, large quantities of imported types are sold. In ladies' underwear vests, drawers, and combination suits are in equal demand in varying weights. The majority are made of jersey-cloth, or in French "tricot" stitch, very elastic and with a soft nap. Ribbed underwear is perhaps the type most in favour. Sleeveless, half-sleeve, and full-sleeve designs are all saleable. The neck and sleeves should be finished in silk draw-ribbons. As regards vests, both slipovers and a coat-shirt pattern are sold, the former preferably shaped on the loom. Drawers may be either knee or three-quarter length; open-seat patterns are preferred. Underwear is generally white or natural colour.

The demand for men's woollen underwear is chiefly for the ribbed pattern—light weights having a small admixture of silk—and for vests and drawers in preference to combinations. Among the working classes and the camp population this is substituted by heavy cotton fleece or cotton-and-wool mixtures.

Patent underwear of the B.V.D. type is gaining ground for summer wear. A fine Swiss woollen-crêpe underwear, both for men and women, known as "Crêpe de Santé" of Rumff or Bachmann make, is coming greatly into use.

The demand for children's underwear is chiefly for full-sleeve combination types. Very little is sold in pure wool. Children's underwear is classified as in Canada by the ages for which it is intended, and should have a deep soft nap. This is a line in which United States exporters are making good progress.

In all woollen underwear for the Argentine market, great attention should be paid to finish and cut. French goods are popular because of the care with which the seams are turned, and the excellent finish of the neck and sleeves. On the other hand, certain North American lines were described as virtually unsaleable because of slipshod finish and poor design. In underwear more perhaps than in most lines, perfunctory factory methods will ruin sales when placed in competition with the careful workmanship of European makers.

CHINA AS A MARKET FOR RUBBER GOODS

Assistant Trade Commissioner G. A. Rolf Emery

[The following is the second of a series of reports by Mr. Emery on the Chinese Market for Rubber Goods, the first of which, dealing with Mechanical Rubber Goods, was published in the last issue.]

Waterproof Clothing

The whole demand in China is for waterproof cloth used in making raincoats, which, judged by Canadian styles, are of inordinate length.

The materials in demand vary considerably. The outer surface of the single cloth is cotton and the inner surface is a fine coating of rubber composition spread on the texture. An equally popular cloth is a double cotton texture interlined with rubber composition. The c.i.f. price ranges from 4s. to 10s. per yard.

Oiled silk is also used to a large extent for the making of such coats, but the plain black rubber coat, so frequently used in Canada, is rarely seen in China. The heavier waterproofed materials are used for automobile tops, radiator hoods, rickshaw hoods and aprons, and in ordinary tarpaulins for covering goods.

One point of importance in the selling of waterproofed materials to the Chinese is strict adherence to shade. A dealer may order fifty ends of one cloth of a particular shade, and the necessity of supplying that shade with no deviation becomes apparent if trade is at all depressed, when off shade forms a plausible excuse for refusing delivery. The prices quoted in this report are those given to the trade by the wholesale distributors.

COMPETITIVE NATURE OF BUSINESS

This branch of the piece goods trade is very competitive, and it is said that only one firm of importers of piece goods has been able to handle it with any great success. A factor which increases the competitive nature of the business is that Dunlops, one of the most active firms in the rubber business in the Orient, owns or controls cotton mills just outside of Manchester, where they manufacture their own fabrics for the production of waterproofed materials.

Domestic, Sanitary, and Surgical Rubber Goods

With one exception, hot-water bottles, domestic and sanitary rubber goods are used only by the foreign population in China, numbering in all 240,000.

Surgical rubber goods are used only by foreign doctors, and by those Chinese doctors who have been educated in Western countries.

Hot-water Bottles.—During the cold winter months in Northern China the Chinese women use the hot-water bottle, of the face bottle size, to keep their hands warm when out of doors, and the trade has developed greatly within the last few years in the principal cities such as Shanghai.

A Canadian manufacturer of hot-water bottles has been doing a very good trade in this country, and this year's business should far outstrip his trade of former years. His prices are as low, if not lower, than those of American goods. Other sizes besides the face bottle are increasing in popularity.

The cost price for the maroon-face bottle is M.$1 and M.$1.05 for the two sizes. The household maroon size 1 of the ordinary hot-water bottle type is M.$1.64; size 2, M.$2.15; size 3, M.$.2.55; and size 4, M.$3. The moulded golden red size 2 and 3 are M.$1.60 and M.$2.15 respectively. The moulded blue, size 2, is M.$2.14.

Combination Water Bottles and Fountain Syringes.—These bottles, as the name implies, perform two functions: one as a hot-water bottle; the other as a fountain syringe. The size of the bottles used are 2, 3 and 4 in the moulded maroon, 2 and 3 in the golden red, and 2 in the blue. The prices to the trade are M.$3.35, 2.65, 4.25, 2.50, 3, and 3.94 respectively.

Combination syringe attachments to fit any hot-water bottle are stocked The tubing is in red, blue, and maroon rubber. The price depends upon the quality of rubber and the number of the pipe attachments.

Fountain Syringes.—The ordinary fountain syringe is made up of bottles, sizes No. 2 and 3 in blue, maroon, and red rubbers. The price depends upon the size, colour of rubber, and the attachments that go with it. A maroon bag size 2, with tubing and infant, rectal, bent-vaginal and irrigator pipes, sells for M.$4.67.

Douche Syringes.—These syringes with an adjustable guard sell at M.$1.27 for the dark red and M.$1.67 for the maroon.

Blue Syringes.—Blue syringes in maroon-coloured rubber only sell for M.$1.16 to M.$2.34, depending upon the number of pipe attachments. The one selling for the most money has an infant, a rectal, a bent-vaginal and irrigator screw pipes.

Infant Syringes.—The infant bulb and pipe syringe ranges in size and price in golden red rubber from No. 2 to No. 5 and from M.$0.43 to M.$1 respectively. The take-apart maroon all-rubber costs M.$0.30 and the regular style maroon M.$0.27.

Ear and Ulcer Syringes.—The ear and ulcer syringes sell for M.$0.23, M.$0.37, and M.$0.60 for the small, medium, and large sizes in maroon-coloured rubber. The take-apart syringe sells for M.$0.30.

Rubber Gloves.—As practically no foreign women perform household work in China, the rubber gloves for this purpose are not in great demad. The golden red, sizes 7 and 8, sell for M.$1.27 per pair. Surgeons' gloves are stocked in sizes 6½ to 8½ and sell for M.$1.05 per pair.

Finger Cots.—On account of price, the tissue pure gum assorted in three sizes and selling for M.$2.70 per 100, are the most marketable. The medium-weight pure gum and the reinforced tip medium weight pure gum sell for M.$3.35 per 100. The heavy weight black finger cots are the most expensive, costing M.$5.65 per 100.

Nipples and Baby Comforters.—Nipples range from M.$4.34 to M.$8 per 100. Nipples to take in the whole of the top of the feeding bottle are M.$0.16

each and with the 8-ounce bottle are M.$0.34 each. Baby comforters with rubber shield and cord cost M.$10 per 100 and with a ring instead of a cord the price is M.$10.85 per 100.

Ice Bags, and Caps and Water Caps.—Ice and water caps vary in price. The moulded maroon 9-inch diameter and the cloth insert, golden red, 9-inch by 11-inch, sell for M.$1.65 each. The cloth-lined, golden red, 9-inch by 9-inch, sell for M.$1.60, and the all-rubber 9-inch by 6-inch at M.$0.94; 9-inch by 7-inch at M.$1, 9-inch by 8-inch at M.$1.05, and 9-inch by 9-inch at M.$1.16. The throat and spinal ice bags, cloth-lined, 9-inch by 12-inch, cost M.$1.60 each. The same type of spinal bag, 4-inch by 18-inch, costs M.$1.77. The pure gum spinal bag 3-inch by 9-inch sells at M.$0.50, and the $3\frac{1}{4}$-inch by $10\frac{1}{2}$-inch, at M.$0.60.

Cushions.—Operating cushions in golden red rubber, size 20-inch by 44-inch and 24-inch by 44-inch, sell for M.$8 and M.$8.80 respectively. Invalid cushions made from the same kind of rubber with diameters of 12-inch, 14-inch, 16-inch and 18-inch, sell for M.$2.85, 3.10, 3.85 and 4 respectively. Air pillows with denim covers, size 11-inch by 15-inch, cost M.$5 each.

Tubes and Tubing.—Rectal and colon tubes, the former 20 and the latter 30 inches long, both with a hole in the end only, and in sizes according to the French scale 22, 28, 30 and 32, sell for M.$0.60 and M.$1.05 respectively. Stomach tubes, open end, one eye on the side, 60 inches long, plain, in sizes 22, 28, 30 and 32, cost M.$1.35 each. With a funnel these cost M.$1.85 each and with a funnel and bulb the cost is M.$2.50 each. The antimony and pure gum tubing in various sizes, sells for M.$4.20 per pound and the maroon tubing sells for M.$2 per pound.

Medicine Droppers.—The regular maroon and black droppers sell for M.$3.50 per hundred, the eye pipettes at M.$10 per hundred, and the bulb droppers at M.$16.70 per hundred.

Hard Rubber Pipes, Syringe Fixtures.—The infant screw pipes cost M.$6.70 per 100, the rectal M.$8 per 100, the bent-vaginal M.$13.20 per 100, and the irrigator at M.$16 per 100. The infant slip pipes sell for M.$5.34 per 100, the rectal for M.$6 per 100 and the bent-vaginal at M.$12 per 100.

Sponges, Bags and Brushes.—The seven sizes of maroon rubber sponges which are stocked range in price from M.$1.60 to M.$12 per dozen with an even difference of M.$0.80 between each size. The Russian sponge sells for M.$8 per dozen, and the yellow sponges sell in two sizes at M.$4 and M.$8 per dozen. Sponge bags in red, blue and green in sizes 6-inch by 7-inch, 8-inch by 9-inch and 10-inch by 11-inch, sell to the trade for M.$6.80, M.$8.70, and M.$12 per dozen respectively. The sponge rubbing brush costs M.$6 per dozen, and the toilet brushes cost M.$.5.40 per dozen.

Toy Balloons.—Toy balloons are being used in greater quantities in China at the Ports. During the New Year holidays—the only ones of the year for the Chinese—and festive occasions such as the Dragon festival, toy balloons are sold on the streets by hawkers. The colours to be seen are red, yellow, blue and green. The ordinary round diameter $7\frac{1}{2}$-inch sells at M.$4 per gross. The heavy gas balloons of the same diameter cost M.$5.70 per gross. The ordinary balloon with diameter $10\frac{1}{2}$-inch sells at M.$5.35 per gross and eccentric shapes such as an inflated balloon with diameter 6-inch and length 15-inch cost M.$8 per gross.

Miscellaneous.—Rubber goggles, selling at M.$8 per dozen, are increasing in use, but in the summer heat the closeness with which they confine the eye makes them unbearable.

Laboratory supplies of pure gum sell to the trade at M.$4 per pound, and semi-pure gum costs M.$2.35 per pound. Crutch tips of any size sell at M.$0.27 per pair. Catheters 16 inches long in even sizes from 8 to 28 (French scale) cost M.$4 per dozen. Breast pumps range in price from M.$0.60 to M.$1.05.

PROBABILITIES OF THE MARKET

Excepting hot water bottles, domestic, sanitary and surgical rubber goods will not as yet sell in large quantities to the Chinese, and the market probabilities at the present time would hardly warrant a manufacturer proceeding further than securing an agent in Shanghai who would supply to the chemists in wholesale lots.

BUSINESS AND FINANCIAL CONDITIONS IN BELGIUM

Trade Commissioner A. S. Bleakney

Brussels, March 12, 1923.—In the uncertain situation prevailing during the economic struggle in the Ruhr, iron and steel producers in Belgium refrain from making engagements, more especially as most mills are covered for three or four months. A wage increase of 10 per cent has been granted to the workers. (Last year a reduction of 10 per cent was made.)

The coke situation is grave; the best employed of the ovens are working 50 per cent capacity only. An increase in the official price of 30 to 40 francs is expected. English coking coal is being offered at prices which are relatively very high and, according to local opinion, almost prohibitive. The export of Belgian coke has been stopped. In the glass industry several large factories are threatened with stoppage owing to lack of coal and, in the circumstances, have ceased to quote.

Among new fiscal proposals advanced by the Belgian Government is one to tax funds originating (and taxed) abroad at 4 per cent instead of 2 per cent, the present rate. It is proposed that the tax on bond coupons should be increased from 10 to 15 per cent, while new levies have been outlined on luxury automobiles and the excise tax on sugar has been doubled.

A general increase has been noted in the price of securities; glass and metals are prominently affected.

In the shipping world it is generally admitted that the Lloyd Royal Belge is insolvent. As the Belgian Government has guaranteed the company up to 100,000,000 francs, it is now faced with the alternative of making good this guarantee, should the company be liquidated or reorganized, or of becoming an associate in the company.

Owing to the premium on French francs in Belgium—i.e., 15 per cent—the restrictions of the eight-hour day, and the higher wages with greater liberty of action in the Republic, many Belgian workmen are emigrating to France. It is estimated that in June last, 120,000 workmen were employed in the Nord and Maubeuge regions. This is double the pre-war estimate.

The *Moniteur Belge* has just published a law giving the Government power to control foreign commerce in all goods and values. Reasons advanced for this measure are restriction of excessive German buying resulting in abnormal prices, also prevention of large movements of values and merchandise detrimental to the public credit arising from the exchange situation.

The mean index for wholesale commodities received a check in December, after rising steadily since April. The general movement in wholesale prices during 1922 is as follows: January, 366; February, 356; March, 350; April, 344; May, 348; June, 356; July, 360; August, 360; September, 364; October, 385; November, 408; and December, 407. These indices are based on April, 1914, figures and reflect to a certain degree exchange rates for imported goods. As the index includes all classes of goods, however, exchange is not the only factor involved.

OPPORTUNITIES IN SOUTH AFRICA FOR WIRELESS EQUIPMENT

Assistant Trade Commissioner J. Cormack

Cape Town, March 1, 1923.—Licenses for installing wireless apparatus were first issued in South Africa shortly before the war, but during the conflict they were entirely suspended. Thereafter they were reissued, and there are 93 transmitting and 300 receiving licenses in the Union. Experimental transmitting has so far only developed.

Judging by the interest shown, there is every reason to believe that before long South Africa will become enthusiastic over radio-telegraphy, especially after the erection of the Union's wireless station.

A bill to confirm a provisional agreement made last year between the Government and the Marconi Telegraph Co., Ltd., was read in the House of Assembly last week, and is almost certain to become law. It calls for the erection, maintenance and operation in the Union of a radio-telegraph station capable of establishing direct communication between the Union, Great Britain and other parts of the world. It provides also that the company shall complete the wireless station in eighteen months, the Government granting the company the right to maintain and operate it for ten years, after which the Government has the option to purchase the station. Of the company's capital, at least 400,000 ordinary shares of £1 each will be subscribed by the contractor, while a portion of the capital will be available for public subscription in South Africa. Failing purchase by the Government, the company is to be allowed to continue operations for additional ten-year periods, the Government having the option to purchase at the end of each period. The wireless rates from the Union to Europe are not to exceed: Full rate, 1s. 4d. per word; deferred and Government, 8d.; press, 2¼d. per word. The Marconi Company undertakes to arrange within reasonable time for direct communication with the new high-power station in Australia, and for distribution of South African messages throughout the Commonwealth of Australia, as well as with other large power stations belonging to such allied wireless companies as may be operating in India, Canada, the United States, Argentine, Brazil, and other countries. Such parts of the station as can be manufactured in the Union are to be tendered for here.

A WIRELESS SERVICE FOR FARMERS

The Marconi Company are taking steps to sound the agricultural community at various centres with regard to the support likely to be accorded to broadcasting service for farms on the "toll" system, releasing frequently such information as market and meteorological reports, technical matter supplied by the Agricultural Department, and miscellaneous news of a suitable character. It is stated that the interest displayed by the more progressive farmers throughout the country is very encouraging, and as the Government is in full sympathy with the project, and has promised to facilitate the issue of licenses to owners of receiving apparatus, a practical issue may be looked for without delay. Receiving sets under this "toll" system will, it is stated, cost about £50 each, and there is evidence that a large number will be required for installation as soon as a service is provided.

PRESENT MARKET

Very few complete wireless sets are being sold at present, the chief items being parts for amateur assembling and completion. Price therefore is one of the deciding selling factors at the moment, but it is thought that when a good broadcasting service is in operation, the higher-priced and better apparatus will make more headway.

The main present sources of supply for this market are the United Kingdom and the United States, while a smaller though quite a good and cheap

exporter is Germany. Although many firms have been sending their goods to the Union, no one has at present a predominating hold, but it is anticipated that the Marconi Scientific Instrument Company—a subsidiary of the Marconi Telegraph Co., Ltd.—will probably be in a position of advantage.

At the present time firms interested would like to have Canadian catalogues, or even better a range of samples, with prices and discounts, so that they may be in a position to order when there is an increased demand. Importers are looking to Canadian manufacturers for something more up-to-date than what is in stock; notices which have appeared in the press describing new developments in equipment and supplies are making them cautious in regard to the orders they place.

TARIFF CHANGES AND CUSTOMS REGULATIONS

Union of South Africa Imposes Dumping Duty on Cement from Great Britain

Mr. James Cormack, Assistant Trade Commissioner, Cape Town, writing under date of March 3, advises that there was issued on that day a *Gazette Extraordinary* extending dumping duty to cement imported from Great Britain. (See *Commercial Intelligence Journal* No. 997, March 10, 1923, page 405.)

Union of South Africa Tariff Changes

Mr. James Cormack, Assistant Trade Commissioner, Cape Town, South Africa, under date of March 31 cables:—

"New Budget proposes increases affecting carbide, confectionery, flour, kraft, syrup, footwear. Embargo to be raised in June. [Import restrictions on certain footwear have been in effect in South Africa for some time.] Asbestos and cement manufactures, glass, paints and colours, rubber tires, now dutiable by weight."

These are apparently only some of the changes in the new Budget. Mr. Cormack is forwarding a report by mail, which will be published in the *Commercial Intelligence Journal.*

New Zealand Levies Charge on Parcels from Overseas

Mr. W. A. Beddoe, Canadian Trade Commissioner in New Zealand, writes under date March 6, 1923, that a charge of 3d. on every parcel from overseas passing through the New Zealand Postal Department came into force on March 1. Hitherto no charge has been levied, and the only payment necessary has been the amount of duty assessed by the Customs Department. The innovation has been decided upon as a means of augmenting the revenue, and a postal official stated yesterday that all parcels from overseas, whether they contained a pair of socks or a piano, would be subject to the levy.

United States Dumping Duty Imposed on Ferro-silicon from Ontario

Mr. M. M. Mahoney, representative at Washington of the Department of External Affairs of Canada, writes that under date of March 23 the United States Treasury Department issued finding of dumping in the case of ferro-silicon from the Province of Ontario, Canada. The finding reads in part as follows: "After due investigation, the department finds that the industry of manufacturing ferro-silicon in the United States is being, or is likely to be injured by reason of the importation into the United States of ferro-silicon imported from the province of Ontario, and that such merchandise is sold or is likely to be sold in the United States at less than its fair value.

TENDERS INVITED

New Zealand

Auckland, March 6, 1923. Copies of plans and specifications have been received from Mr. W. A. Beddoe, Canadian Trade Commissioner, Auckland, N.Z., for equipment for the Public Works Tenders Board, Wellington. These plans and specifications are open for inspection at the Trade and Commerce Department, Ottawa (quoting file No. 28489). Tenders should be addressed to the Secretary, Public Works Supplies and Tenders Committee, Government Buildings, Wellington, in accordance with these specifications.

No.	Date of Closing.	Particulars.
S.M. 160	June 26, 1923....	Waikato Power Scheme, Seccion 60. 2 generator oil switches, 5,000 volts (not including apparatus on switchboard); 1 transformer oil switch, 5,000 volts; 2 bus-tie switches, 5,000 volts; exciter transformer oil switches; spares for above oil switches (5,000 volts as specified; 2 panels for exciter sets; switchboard panels on gallery; 2 Outgoing line switches, 50,000 volts (not including apparatus on switchboard); transformer switch, 50,000 volts; spares for above oil switches, 50,000 volts; 18 single pole isolating switches, 600 amps., 5,000 volts. *or alternatively* 6 three pole switches; 12 single pole isolating switches, 500 amps., 5,000 volts. *or alternatively* 4 three pole switches; current transformers for generators; current transformers for transformers; voltage transformers; 5,000 volt cable (clause 11) (per ft.); 300 amps. capacity; 600 amps. capacity; 50 amps. capacity.

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain.	†*France*..	New York..	April 18
" " "	†*Manchuria*..	"	" 19
" " "	*Montclare*	St. John..	" 20
" " "	†*Pres. Roosevelt*..	New York..	" 21
" " "	-*Melita*..	St. John..	" 21
" " "	*Megantic*..	Halifax..	" 22
" " "	*Emp. Britain*..	St. John..	" 24
" " "	†*Paris*..	New York..	" 25
" " "	†*Finland*..	"	" 26
" " "	-*Marloch*..	St. John..	" 27
" " "	†*Olympic*..	New York..	" 28
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela..	*Caraquet*..	Halifax..	" 27
Barbados, Trinidad, British Guiana, Cuba, Jamaica, and Colombia..	**Can. Runner*..	"	" 21
Bermuda, Bahamas, Jamaica, Colombia,	**Andalusia*..	"	" 26
British Honduras..	**Can. Fisher*..	"	" 12
China and Japan..	*Emp. Asia*..	Vancouver..	" 19
" " "	*Pres. Madison*..	Victoria..	" 20
Australia only..	‡*Sonoma*..	San Francisco..	" 24
Australia and New Zealand..	*Makura*..	Vancouver..	" 27

† Letter mail only. * Parcel post specially addressed correspondence only.

‡ Letter and Paper mail only. Papers parcel post and specially addressed correspondence only.

: The *Empress of Britain* will also be used for direct mail for the Continent including direct parcel post to France.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING APRIL 3, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement on the nominal closing quotations for all the principal exchanges for the week ending April 3, 1923. Those for the week ending March 27 are also given for the sake of comparison.

		Parity	Week ending March 27, 1923	Week ending April 3, 1923
Britain .. ..£	1.00	$4.86	$4.7701	$4.7525
France .. ..Fr.	1.	.193	.0667	.0668
Italy .. ..Lire	1.	.193	.0502	.0511
Holland .. ..Florin	1.	.402	.4012	.4000
Belgium .. ..Fr.	1.	.193	.0576	.0575
Spain .. ..Pes.	1.	.193	.1568	.1563
Portugal .. ..Esc.	1.	1.08	.0457	.0509
Switzerland.. .. .. Fr.	1.	.193	.1881	.1881
Germany .. .. Mk.	1.	.238	.000049	.000048
Greece .. .. Dr.	1.	.193	.0127	.0122
Norway .. .. Kr.	1.	.268	.1842	.1839
Sweden .. ..Kr.	1.	.268	.2707	.2709
Denmark .. .. Kr.	1.	.268	.1953	.1944
Japan .. ..Yen	1.	.498	.4934	.4950
India .. .. R.	1.	2s.	.3230	.3207
United States .. ..$	1.	$1.00	1.0175	1.0181
Mexico .. ..$	1.	.498	.4954	.4950
Argentina .. ..Pes.	1.	.424	.3777	.3858
Brazil .. .. Mil.	1.	.324	.1132	.1119
Roumania .. .. Lei	1.	.198	....	....
Jamaica .. ..£	1.	4.86	4.7873	4.7813
British Guiana .. ..$	1.	1.		
Barbados .. ..$	1.	1.		
Trinidad .. ..$	1.	1.		
Dominica.. .. ..$	1.	1.	.9878	.9895
Grenada .. ..$	1.	1.	.9918	.9920
St. Kitts .. ..$	1.	1.		
St. Lucia.. .. ..$	1.	1.		
St. Vincent .. ..$	1.	1.		
Tobago .. ..$	1.	1.		
Shanghai, China .. ..Tael	1.	.708	.7822	.7795
Batavia, Java .. .. Guilder	1.	.402	.3955	.3957
Singapore, Straits Settlements .. $	1.	.567	.5647	.5650

CHEMICAL MARKET IN BRITISH MALAYA

There is a considerable market in British Malaya for chemical products, and the improvement in trade generally which was particularly manifested during the latter half of 1922 witnessed a marked increase in the importation of a number of items. Statistics furnished by the Malay States Information Agency, 88, Cannon street, London E.C. 4, show that in the case of drugs and medicines the value of imports increased from £243,904 in 1921 to £341,754 last year, while perfumery and cosmetics, and toilet soap rose from £105,989 to £126,504, and from £28,344 to £44,922, respectively. Acetic acid, which is used for the coagulation of latex on the rubber estates, jumped in value from £23,462 in 1921 to £118,924 last year, the increase in quantity being even more pronounced, 48,650 gallons in 1921 having risen to 387,594 gallons in 1922. Other items show a decrease in value as follows: Soap, £162,134, as against £187,304; chemicals, £148,942, £158,868; druggists' and dentists' sundries, £15,084, £23,760; aniline dyes, £6,466, £10,693; synthetic indigo, £5,572, £9,242. A proportion of these imports are re-exported from British Malaya, principally to Siam and the Siamese Malay States, Borneo, French Indo-China, and the Dutch islands in the Archipelago. The most important item re-exported last year was drugs and medicines to the value of £100,176, the next in order of importance being chemicals (£38,674) and soap (£37,006).

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Quebec, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1454. Flour Agency.—A firm in Johannesburg would like to receive offers of hard Canadian flour; names to be specified.

1455. Oats, Maize, Flour, etc.—A commission agent in Antwerp interested in the importation of oats, maize, wheat, flours, breadstuffs, dried apples and apricots, also canned lobster, wishes to represent Canadian houses exporting these products.

1456. Cereals.—A produce broker in Bristol desires to act as agent or receive quotations for Canadian cereals such as peas, beans, etc., c.i.f. Avonmouth.

1457. Corn, Seeds, Flax, Tow and Hemp.—A commission agent in Antwerp, representing foreign firms, desires to open up new agencies for Canadian firms exporting corn and seeds, also flax, tow and hemp.

1458. Timothy and Oats.—A firm in Antwerp, Belgium, would like offers for first quality timothy hay in bales—100-ton lots; also for oats.

1459. Hay.—An importer of hay in Bristol desires quotations from Canadian exporters on 100-ton basis per week for timothy only or best clover mixture.

1460. Linseed Cake and Cotton Flour.—A commission and consignment agent in Antwerp would like to receive offers from Canadian firms for linseed cake and cotton flour.

1461. Lobster Conserve.—A firm in Stockholm, Sweden, are desirous of obtaining the agency for Canadian manufacturers and exporters of lobster conserve.

1462. Evaporated Apples.—A firm of produce dealers in Bristol desire quotations for Canadian evaporated apples in approximately 300-box lots, containing 50 pounds to the box.

Miscellaneous

1463. Hardware.—An importer of Canadian and American goods in Bristol, with three salesmen covering the area, is desirous of obtaining agencies for suitable lines of ironmongery and hardware supplies or specialties of any type.

1464. Hardware and Tools.—A firm of contractors and engineers in Northern India wish quotations c.i.f. Karachi on the following goods: mild steel beams and bars, wire nails, brass wire gauze, feather and flat edge files, hand saw blades and hand saws, iron nails with iron caps, door fittings, carpenters' and blacksmiths' tools.

1465. Hardware and Machinery.—An Indian merchant firm in Madras wish to get into touch with Canadian manufacturers of the following goods with a view to representing them in Southern Indian markets; builders' hardware, tools, cast iron water pipes, roofing materials, mild steel rivets, bolts and nuts, wire nails, flour and saw milling machinery, oil engines, and agricultural machinery.

1466. Iron and Steel Goods, Tools, Wire, Metals, Waste Paper.—A London firm, who buy principally on account of their house in India, are prepared to consider offers from Canadian manufacturers of angles, joists, bars, plates, rails, gas tubes, bolts and nuts, wire and cut nails, tacks, screws, rivets; mechanics' and machine tools; wire (fencing, barbed, galvanized and bright, copper); zinc sheets and babbit metal; unread newspapers (large white in press packed bales).

1467. Woodpulp, Newsprint and Kraft Paper.—A firm in Paris want to secure the representation for France of an important Canadian manufacturer of woodpulp, newsprint and kraft paper.

1468. Coathangers.—An excellent firm of wholesalers in Glasgow, specializing in household woodenware, would like c.i.f. Glasgow quotation, and sample if possible, of wood coat-hanger with bar.

1409. Tanned Leather Uppers for Footwear Manufacture.—A firm in Rome, Italy, doing business on a cash against documents basis require general information from Canadian exporters of the above article.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From St. John

To London.—Brant County, I.C. Transports, Ltd., April 11; Bosworth, Canadian Pacific Steamships, Ltd., April 18; Canadian Conqueror, Canadian Government Merchant Marine, April 21.

To London (via Halifax).—Lexington, Furness Line, April 12; Ariano, Furness Line, April 24.

To Manchester (via Halifax).—Manchester Producer, Manchester Line, April 14; Manchester Corporation, Manchester Line, April 26.

To Liverpool.—Canadian Explorer, Canadian Government Merchant Marine, April 11; Montrose, Canadian Pacific Steamships, Ltd., April 13; Montclare, Canadian Pacific Steamships, Ltd., April 20; Marloch, Canadian Pacific Steamships, Ltd., April 27.

To Cardiff and Swansea.—Canadian Navigator, Canadian Government Merchant Marine, April 18.

To Glasgow.—Marburn, Canadian Pacific Steamships, Ltd., April 19.

To Glasgow and Avonmouth.—Cabotia, Cunard-Anchor-Donaldson Line, April 26.

To Hull (via Halifax).—Lexington, Furness Line, April 12; Ariano, Furness Line, April 24.

To Southampton.—Melita, Canadian Pacific Steamships, Ltd., April 21; Empress of Britain, Canadian Pacific Steamships, Ltd., April 24.

To Belfast, Dublin, Londonderry and Cork.—Dunaff Head, Head Line, April 10.

To Cherbourg, Southampton and Hamburg.—Empress of Britain, Canadian Pacific Steamships, Ltd., April 24.

To Antwerp.—Minnedosa, Canadian Pacific Steamships, Ltd., April 7; Melita, Canadian Pacific Steamships, Ltd., April 21.

To Rotterdam.—Brant County, I.C. Transports, Ltd., April 11.

To Hamburg.—Hastings County, I.C. Transports, Ltd., April 21; Empress of Britain, Canadian Pacific Steamships, Ltd., April 24.

To Havana.—A steamer, Nagle & Wigmore, April 15 and 25.

To Havre and Hamburg.—Hastings County, I.C. Transports, Ltd., April 21.

To Australia and New Zealand.—Atholl, New Zealand Shipping Co., April 25.

To Rio de Janeiro, Santos, Montevideo and Buenos Aires.—Halizones, Houston Line, April 8.

From Halifax

To Liverpool and Queenstown.—Laconia, Cunard-Anchor-Donaldson Line, April 9; Megantic, White Star Line, April 22.

To Plymouth, Cherbourg and London.—Antonio, Cunard-Anchor-Donaldson Line, April 23.

To Glasgow.—Cassandra, Cunard-Anchor-Donaldson Line, April 16.

To Bermuda, St. Kitts, Antigua, Montserrat, Dominica, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad and British Guiana.—Royal Mail Steam Packet Co., April 13 and 27 and every fortnight.

To Barbados, Trinidad and Demerara.—Canadian Runner, Canadian Government Merchant Marine, April 21.

To Bermuda, Nassau, Jamaica and British Honduras.—Canadian Fisher, Canadian Government Merchant Marine, April 12.

To Australia and New Zealand.—Canadian Miller, Canadian Government Merchant Marine, April 20.

From Vancouver

To Yokohama, Kobe, Moji, Shanghai, Manila and Hong Kong.—Alabama Maru, Osaka Shosen Kaisha, April 19.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Asia, Canadian Pacific Steamships, Ltd., April 19.

To Yokohama and Kobe.—Alabama Maru, Osaka Shosen Kaisha, April 19; Hakata Maru, Nippon Yusen Kaisha, April 30.

To Yokohama, Kobe, Hong Kong and Manila.—Philoctetes, Blue Funnel Line, April 28.

To Yokohama, Kobe, Shanghai, Manila and Hong Kong.—Stuart Dollar, Canadian Robert Dollar Co., April 15.

To Australian Ports.—Canadian Inventor, Canadian Government Merchant Marine, April 10.

To the Orient.—Canadian Freighter, Canadian Government Merchant Marine, April 30.

To Dairen (Manchuria).—Alabama Maru, Osaka Shosen Kaisha, April 19.

To Honolulu, Suva, Auckland and Sydney.—Makura, Canadian-Australasian Line, April 27.

To Auckland, Lyttleton, Dunedin, Melbourne, Adelaide and Sydney.—Hauraki, Canadian-Australasian Royal Mail Line, May 10.

To London and Liverpool.—Astronomer, Harrison Direct Line, April 15.

To Liverpool, London, Rotterdam and Antwerp.—Cardiganshire, Royal Mail Steam Packet Company, loading first half of April.

To Rotterdam, London and Antwerp.—Noerdyk, Royal Mail Steam Packet Company, loading last half of April.

From Victoria

To London and Liverpool.—Astronomer, Harrison Direct Line, April 13.

To Yokohama, Kobe, Shanghai, Manila and Hong Kong.—President Madison, Admiral Oriental Line, April 20.

To Yokohama and Kobe.—Iyo Maru, Nippon Yusen Kaisha, April 14; Shidzuoka Maru, Nippon Yusen Kaisha, May 1.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Asia, Canadian Pacific Steamships, Ltd., April 19.

FIVE POINTS FOR THE EXHIBITORS AT TRADE FAIRS TO CONSIDER

Few firms have a considered and definite policy in regard to exhibitions, writes an Exhibition Expert in the *Manchester Guardian Commercial*. Like any other medium of trade, an exhibition should be the subject of a definite policy, and each proposal should receive due consideration. There are only four or five points on which a manufacturer need satisfy himself in order to choose the path of security and profit. The points are these:—

(1) *Business or Propaganda.*—Which is to be looked for at the Exhibition? And in what proportion?

(2) *Stability of the Fair and of its Promoters.*—Many an exhibition with an excellent idea behind it is wrecked by dishonesty and inefficiency or by rashness and inexperience. The fair which goes bankrupt before it opens, or eventually only half opens, has caused many firms to regard all exhibitions with suspicion. In the case of foreign fairs, the manufacturer should also satisfy himself that there are no vexations regulations which give exhibitors of one nationality an advantage over others.

(3) *The Market.*—Will the fair reach the desired market? If so, is it a market in which the exhibitor can profitably compete? Even if he cannot, may it not be worth while entering it in order to prevent the strengthening of some foreign competitor?

(4) *Cost.*—Taking everything into account—freight, Customs, cost of stall, etc.—will the cost of exhibiting be reasonable? It must be remembered that a proportion, at any rate, of the cost of most exhibitions can be written off against advertising.

(5) *Physical Difficulties.*—Can an effective exhibit be got ready in time? Can it be shipped and erected by the time it is wanted.

If he can satisfy himself on these points, the manufacturer should be reasonably certain of achieving definite and satisfactory results.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 285 Beaver Hall Hill, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address Canadian.*

Australia

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil

E. L. McColl. Address for letters—Caixa Postal 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China

J. W. Ross. Address for letters—P.O. Box 300. Office—Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba

Address: 400 and 401 Teniente Rey 11, Havana. (Post Office Box 1290.) *Cable Address, Cantracom.*

France

Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland

Norman D. Johnston, Zuidblaak 26, Rotterdam, *Cable Address, Watermill.*

India and Ceylon

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan

A. E. Bryan, P.O. Box 109 ; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico

C. Noel Wilde. Address for letters, Apartado Num. 126 bis, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian.*

New Zealand

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements

A. B. Muddiman, P.O. Box 121, Singapore. (Territory covers Straits Settlements. British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

Douglas S. Cole, Acting Trade Commissioner, Sun Building, Clare street, Bristol. *Cable Address, Canadian.*

Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States

Frederic Hudd, 44 Whitehall street, New York City. *Cable Address, Cantracom.*

Trade Commissioner P. W. Ward, formerly of Singapore, is at present temporarily attached to headquarters at Ottawa.

CANADIAN COMMERCIAL AGENTS

Australia

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark

C. E. Sontum, Grubbegd, N. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

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DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

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TABLE OF CONTENTS

Commercial Intelligence Journal

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BUSINESS AND FINANCIAL CONDITIONS IN AUSTRALIA

Mr. D. H. Ross, Canadian Trade Commissioner in Melbourne, sends, under date April 7, 1923, the following cablegram descriptive of business and financial conditions in Australia:—

"Easter holiday season caused temporary suspension of commercial activities, but trade has assumed normal proportions and agents for oversea manufacturers report that a considerable volume of orders is being placed. The 1923 Australian apple export season has practically concluded; total shipments exceed 2,122,000 cases, of which Tasmania contributed 1,512,000 cases. Considerable quantities of the 1922 pack of Australian canned fruits are still waiting realization in London, and the large 1923 pack, financially assisted by the Commonwealth Government, is now available for shipment oversea. Through the drying period being exceptionally favourable, Australian currants and raisins are now being garnered under excellent conditions; indications are that production is heavy, while grading and packing have much improved, hence exporters are hopeful of receiving substantial orders from Canada. The Australian series of wool sales is closing within a fortnight with recent realizations fully up to earlier auction values. Through adverse climatic conditions, indications for the 1923 clip are that there will be a shortage in production, higher values, and somewhat broken range of staple. There is a revived demand for wheat and flour for export; wheat to-day 5s. 4¼d., flour £10 7s. 6d. short ton, 150 lb. sacks free aboard; considerable orders received from South Africa and China. Despite continued dry weather, business proceeds steadily with little contraction in country trade, thus reflecting generally prosperous state of farming community. Commonwealth and State Governments are completing arrangements for the preparation of exhibits for the British Empire Exhibition."

IRISH FREE STATE IMPORT DUTIES

TRADE COMMISSIONER GORDON B. JOHNSON

Glasgow, March 28, 1923.—As already reported by cablegram from this office, from April 1 the Irish Free State will be separated from the United Kingdom for customs purposes. From that date any import duties of Great Britain will apply to goods imported from the Free State, and on the other hand, the Free State will impose practically similar duties upon goods from Great Britain. In this connection, Great Britain denotes England, Scotland, Wales and Ulster.

For customs purposes traffic from Liverpool or Glasgow to Dublin and Cork will therefore no longer be "coastwise" traffic but "foreign," whereas traffic from Liverpool and Glasgow to Belfast and Londonderry will be coastwise, that from Dublin and Cork to Belfast and Londonderry and vice versa will be foreign.

In brief, in accordance with the treaty of last year, the Irish Free State now legally occupies the position of a Dominion of the British Empire, and the import duties of Great Britain, including Ulster, therefore now apply to the

Free State as they do to Canada or Australia. Similarly, dutiable goods from Great Britain, including Ulster, passing to the Free State, will pay duties to the Free State. At present the duties imposed by the Free State are similar to those in force in Great Britain, no changes having yet been made from those in force for the United Kingdom. The principal dutiable goods are:—

Tobacco,
Cigars,
Cigarettes,
Spirits,
Liquors,
Perfumery,
Beer,
Tea,
Musical instruments,
Gramophones,
Cinematograph films,
Clocks and watches,
Gramophone records,
Wireless valves,
Vacuum tubes,
Glucose,
Saccharine,
Wine,
Playing cards,
Matches,
Table waters,
Cider,
Motor cars,
Motor accessories,
Compounds of thorium,
Synthetic organic chemicals.
Optical instruments,
Optical glass,
Scientific glassware,
Scientific instruments,
Metallic tungsten,
Coffee,
Chicory,
Dried fruit,
Cocoa,
Chocolate,
Sugar,
Confectionery,
Molasses,
Gauges,
Arc lamp carbons,
Hosiery,
Analytical re-agents,
Fine chemicals,
Laboratory porcelain,
Ignition magnetos,
Motor-cycles.

One way in which Canadian trade with Ireland may be affected by these tariff changes is the greater scope thereby offered in Ireland to Canadian motor cars, sugar and perhaps musical instruments, by reason of the tariff now to be imposed against these articles manufactured in Great Britain. The import into Ireland of American motor cars, for instance, has not been small. In 1920 they amounted in value to £464,500, while Belgium and Canada supplied £33,800 and £29,300 worth respectively. From Great Britain in the same year the imports of cars and chassis amounted to just over £3,000,000. These figures include Ulster, as no statistics are available to defferentiate between the Free State and Northern Ireland. It is believed in certain quarters that the new duty against the better-finished English car will be of great benefit to the United States car manufacturers. If this is the case, as there can be little reason to doubt, it should be equally beneficial to Canadian car manufacturers if they will go after the business.

The total imports of sugar into Ireland in 1920 amounted to 1,753,000 cwts. These figures exclude confectionery, glucose, molasses, syrup and treacle. Of this quantity 510,000 cwts. entered at Belfast, 287,000 at Cork, 559,000 at Dublin, and 395,000 at Waterford, Londonderry, Limerick and Newry. The direct shipments from places abroad, other than Great Britain or through Great Britain, were 425,000 cwts., of which 193,000 came from Mauritius, 170,000 from Java, and 49,000 from the United States.

In 1920 the imports of pianos into Ireland were valued at £69,000, organs £16,000, and musical instruments, unclassified, £92,000.

From the foregoing, it will of course be gathered that the six counties of Ulster, or Northern Ireland, are still part of the United Kingdom for customs purposes, and of course free trade is in existence between this area and England and Scotland.

MARKET FOR WHEELBARROWS IN GREAT BRITAIN

Trade Commissioner J. E. Ray

Manchester, March 29, 1923.—As a good deal of road-making and other constructional work is likely to be undertaken in Great Britain during the next two or three years, Canadian manufacturers of wheelbarrows should be on the alert for orders. They are quite familiar with the types acceptable in Great Britain, as some makers have been successful in placing their wheelbarrows in the north of England during the last ten years, due in no small measure to their appreciation of the requirements of contractors, etc.

A firm interviewed by the writer state that at the present time they have an enquiry for 1,000 wheelbarrows, and they see no reason why Canadian manufacturers cannot quote acceptable prices, which should be c.i.f. Liverpool or Manchester.

The name of the firm is on file at the Department of Trade and Commerce, Ottawa, and may be obtained on application to the Director, Commercial Intelligence Service.

INDUSTRIAL AND COMMERCIAL NOTES FROM BRISTOL AREA

Avonmouth Lairage for Canadian Cattle

Bristol, March 27, 1923.—In view of the lifting of the embargo against Canadian cattle, and of representations received from various quarters indicating the probability in the near future of the direct importation of live cattle, the Docks Committee have decided upon and issued instructions for the extension and renovation of their Avonmouth (Bristol) lairage forthwith to its original full capacity of 1,000 head of cattle, in order to conform with all requirements of the Ministry of Agriculture. Renovations have already taken place to a capacity of 300 head, and the remainder of the work will be carried out as quickly as possible. It is as yet too early to say when the first shipment may be made, but the coming Montreal season will see the reopening of the long-idle lairs at the mouth of the Avon. Avonmouth should prove particularly suitable in view of the fact that there are two competing railways, the Great Western and the Midland, going direct to Avonmouth, and such Irish cattle as are coming into Bristol at the present time are brought up the river to the city docks, thus not interfering with the lairage and eliminating any chance of a tie-up owing to Irish and Canadian cattle arriving at the same time.

The docks at Cardiff are owned by the Great Western Railway, and have therefore all the facilities of this system behind them for distribution.

British Industries Fair (Birmingham)

It has now been definitely decided by the Council of the Birmingham Section of the British Industries Fair that the 1924 exhibition will be held in the month of May. This has been found necessary owing to the fact that numbers of buyers from the South Americas and the Dominion will not visit either England or Germany in the more or less wintry weather of February, whereas it is the custom for considerable numbers to come over in the early summer.

Now that a better perspective of the Birmingham Fair can be obtained, it is found that the bulk of the hardware exhibitors, especially those showing grates, hearth furniture, hollow-ware of all kinds and metalware, have expressed themselves as quite satisfied with the results, not necessarily in actual orders but in the volume and nature of the inquiries.

South Wales Coal Trade

Owing to extreme congestion of the Cardiff docks and the recent refusal of the coal trimmers and tippers to adopt the three-shift system, large numbers of steamers are being held up. Pressure of business is being maintained, and colliery owners are very fully booked, and any further strikes at the mines must reduce quantities available. In addition to numerous inquiries from France, Italy, and Germany, it appears that Russia is now on the market for heavy quantities.

Canadian Clothes Pegs

The sale of Canadian round dolly clothes pegs has been most satisfactory as far as early spring deliveries are concerned. The stocks of one Canadian company that have been maintained at Avonmouth are quite exhausted. The demand is much better for clothes pegs than for spring clothes pins. Canadian spring clothes pins are being offered in the vicinity of 1s. per gross c.i.f. London or Avonmouth, free cases. Continental competition continues to be very severe, and it is increasingly important that Canadian manufacturers should make spring clothes pins with seven turns in the coil instead of four as is at present the custom. It has also been suggested that if the wire which holds the four coil spring together were extended down the side to eliminate lateral movement, it would give a selling point which might assist in diminishing Swedish competition.

BUSINESS AND FINANCIAL CONDITIONS IN BRITISH MALAYA

Trade Commissioner A. B. Muddiman

Singapore, March 3, 1923.—In March, 1920, the face value of currency notes in circulation in Malaya amounted to 183,000,000 dollars (Straits). This has been rapidly falling owing to the depression prevailing in this colony, due to the position of the two great industries, rubber and tin, that dominate the local market. In March, 1921, the face value of local currency was only $92,177,836, while the year after, in March, 1922, it had decreased to $80,672,185 and by the last return (September, 1922) it was down to $72,009,349.

The consequent decrease of money in the hands of the public has affected every kind of business. However, the local merchant business has not suffered so much, perhaps, as the productive industries. Fortunately, however, after the disastrous year 1921, the showing for 1922 will probably prove it has not been affected quite so much as 1921. Tin made a return to normal after the boom year in 1920 and will probably rise in price. The price of rubber did not rise in comparison with the fall in the purchasing value of money. It has been well stated in a recent report that "on the eve of a slump which reduced prices by fully two-thirds, the industry was facing a higher cost of production and was selling at the low pre-war rates."

TRADE STATISTICS

Until quite recently the statistics of the Malay Peninsula have been a most difficult problem to deal with. Owing to the chaotic conditions prevailing, the whole peninsula was not treated as one commercial unit. Fortunately, however, this great mistake has been remedied, and a complete survey of the peninsula's trade is being published month by month, which will enable business men to obtain a much closer grasp on the imports and exports of this area.

DEVELOPMENT OF NEW INDUSTRIES

Due to the fact that the rubber and tin industries are likely to be subject to fluctuations from time to time, research work has been carried on in the colony for the development of other new industries. While British Malaya has plenty of other resources, the great difficulty in developing these will be capital and labour. The capital will have to be sought from outside sources as in the development of any other young country. The labour question in the development of new industries is undoubtedly a problem here. In comparison with the price of some other oriental labour, Malayan labour is highly paid. Further, unfortunately, owing to easy living conditions, the Malay himself is an unwilling worker. The early days of the history of the colony, until the period of the large invasion of Chinese labour, is full of instances of labour troubles. The first energetic Scottish colonies and Chinese merchant adventurers had great difficulty in coaxing the natives to engage in regular work.

The new industries in which investigation is being carried out are numerous. The cultivation of the Nipah palm is being investigated. This tree, when tapped, yields saccharine. Samples of paper pulps have been prepared and partly investigated. Various fibres are under investigation, including Roselle, which appears to be a valuable product. The production of lime juice in Perak for the local manufacture of the concentrated juice and citric acid is being tested. Again, desiccated coconut and other investigations in connection with coconuts have been carried on. The local product of Kapok for life-saving apparatuses is also being examined. Further, interest is being aroused in the growth of cinchona, fertilizers such as guanos, etc.

BRITISH EMPIRE EXHIBITION

Preparations for the Malayan pavilion at the British Empire Exhibition, to be held at Wembly Park, London, from April to October, 1924, are already taking good shape. Instead of only securing a part of the combined Far Eastern pavilion, which aroused a strong protest, permission has been received for a separate Malayan pavilion, on the understanding that hospitality to the extent of 600 square feet should be extended to Mauritius. Plans have been drawn up for a building of from 30,000 to 50,000 square feet. Revised estimates for building were received early in January; the cost of the pavilion should amount to $9 per square foot. British North Borneo and Sarawak have decided that, owing to financial reasons, they are unable to participate.

The local conference lines have generously granted a 50 per cent reduction on freights of bona fide exhibits.

UNITED STATES AS A MARKET FOR SWEDISH PULP

The *Swedish Economic Review* for December, 1922, calls attention to the extraordinary advance of the United States as a consumer of Swedish wood pulp. Exports of this product are chiefly to the United States, England, and France, the United States and England each taking nearly one-third of the total amount exported. On the basis of value America's position is predominant, since the shipments to this country are mainly chemical pulp, the price of which is about twice that of mechanical pulp, which forms a considerable part of the English imports.

GENERAL BUSINESS SITUATION IN SOUTH AFRICA

Assistant Trade Commissioner James Cormack

Cape Town, March 9, 1923.—Business conditions continue to improve throughout the Union, but, as the situation still calls for caution, the improvement is as yet very gradual. Stocks of supplies on the mines and in business houses are reported to be meagre, and they must come into the market at short intervals. The mines are strenuously practising economy, in view of the decline in value of the gold premium. Local prices are at the moment keeping fairly level notwithstanding the reported firming up of prices, especially of iron and steel goods, overseas. Money is still tight, and merchants are disinclined to embark on new enterprises.

Heavy rains have fallen over the Union, and these have been greatly beneficial to districts which were badly parched. This will be especially helpful to the stock farmers who had been compelled by the drought to trek with their cattle, and who have now been able to return to their farms.

The Union Government is this week fathering a bill to create bounties for the export of cattle from South Africa.

Railway Earnings.—Railway earnings for the period April 1, 1922, to November 30, 1922, totalled £13,291,119, a decrease compared with the corresponding period of the previous year of £1,037,713, or 7·2 per cent. During the same period of working, expenditure of the railways was £10,351,319, a decrease of £1,363,279, or 11·6 per cent. After meeting all expenditure on working and under net revenue accounts, including depreciation and interest, a profit of £428.804 was shown, but after providing for contributions in reduction of stores stock and to pensions funds, a net loss of £146,677 is disclosed.

British Empire Exhibition, 1924.—A strong committee has been formed to organize the South African section of the British Empire Exhibition, formed of representatives from the Agricultural Union of South Africa, Association of Chambers of Commerce, Chambers of Mines, and Federated Chambers of Industries, as well as representatives from the principal Government departments. The Government has voted £50,000 for the purposes of the South African exhibit, and it is hoped to raise supplementarily a similar amount. It is expected that the South African pavilion will cover at least 40,000 square feet.

PRODUCTION OF WOOD PRODUCER GAS

A Swedish sawmill operator recently gave in Washington an interesting lecture accompanied by moving pictures showing his plant, says the United States *Commerce Reports*. Particular stress was laid upon the utilization of wood waste. It was of special interest to notice that the power for the plant was generated by gas obtained from wood waste. In this manner the mill was able to save 75 per cent of the fuel ordinarily used when the sawdust and chips were fed directly under the boiler. Besides this saving in waste the company obtained valuable by-products, such as acids, wood alcohol, tar, etc.

Although this process of producing gas from sawmill waste is known and in use in the U.S.A., it is by no means a general practice and in cases where the market can be developed for sawmill waste, and particularly in cases where sawmills are operated in connection with pulp mills, it would seem that this process should command the attention of our sawmill operators.

TRADE CONDITIONS IN NEWFOUNDLAND

By A. E. MacEachren, Junior Trade Commissioner

I

The cod fishery is the basic industry of Newfoundland, and on it the economic life of the Dominion is chiefly dependent. More than 50,000 persons out of a total population of about 260,000 are directly employed in its prosecution, and some 17,000 craft of all sizes engage in the Newfoundland shore, the Banks, and the Labrador fisheries annually. When the catch is large, there is general prosperity providing prices are reasonably high, while a small catch with low prices has a disastrous reactionary effect. It is the practice of the master fishermen to advance supplies to their fishermen against the probable catch. Merchants anticipate their requirements speculatively in advance, and a poor season leaves them with heavy stocks on hand which the people are unable to purchase, while the master fishermen are forced to stand a loss as well.

Cod fish are exported to the United Kingdom, Brazil, Spain, Portugal, Italy and Greece, while during recent years Roumania was a large purchaser. Roumania's purchases of cod were paid for in bonds, which were greatly depreciated in value, and had been considered by many of the holders to represent a total loss. Advice has been received in St. John's, however, that Roumania has arranged to pay during this month four per cent interest upon those bonds, of which several million dollars' worth are held by Newfoundland fish exporters.

In 1918 Newfoundland fish was selling at an average of $15 per quintal in foreign markets, and the sum realized from fish exports in that year was more than $35,000,000. In 1922 prices received for fish ranged from $4 per quintal for Labrador cure, to $6 for shore catch, and the exports were valued at $14,-448,736. Thus, while the amount of fish exported in 1922 exceeded that sent abroad in 1918 by over half a million quintals, the monetary return to Newfoundland for fish exports in 1922 was some $10,551,264 less than that received in 1918. The far-reaching effect of this disastrous fall in prices upon the general business and prosperity of the Dominion may be realized when it is remembered that, in pre-war days, the accepted " barter rate " was based upon the assumption that a quintal of fish would purchase one barrel of flour. At the present time flour is retailing at about $12.50 per barrel, while the average fish catch nets the fishermen only about $5.25 per quintal.

The action of the Newfoundland Government in the fall of 1920 in endeavouring to maintain fish prices on falling world markets entirely failed. Owing to currency depreciation and the impoverished condition of those European countries which had been the principal purchasers of Newfoundland fish, sales could not be effected at anything like the prices fixed by the Government of Newfoundland. Norwegian fish exporters took immediate advantage of the situation, and flooded the markets with their exports, and thus gained a foothold which they are making strenuous efforts to retain.

Loans aggregating $490,000 were made by the Government during 1921 for the purpose of assisting fishermen to prosecute their calling, and individual fishermen were enabled to borrow up to $1,000 to assist in financing the purchase of their supplies. These loans were due on January 1, 1922, and a large percentage is still outstanding, and their payment depends altogether upon the success of the fisheries during the coming and successive seasons.

THE SEAL FISHERY

Only eight steamers, the smallest number since the inception of the industry, are engaged in the seal fishery off the coast of Newfoundland this year. Last

year the total catch of seals amounted to 126,031 which represented an increase of 24,579 over 1921. The seals taken in Newfoundland are known as "Hair Seal," and the skins are shipped principally to Scotland, where they are dressed into a fine quality of leather. Seal oil has a medicinal and edible value, and is also used as an illuminant in mines. Oil is extracted from the fat by a special process conducted at manufactories in St. John's. A novel development this year in the prosecution of the seal fishery is the use of an aeroplane which is carried on a platform built on one of the ships for the purpose of endeavouring to more readily locate the "main patch" of seals.

PULP AND PAPER INDUSTRIES

The pulp and paper industry has assumed considerable importance in Newfoundland. There is an abundance of black spruce and fir, and the suitability of this timber for paper making has been demonstrated by the Anglo-Newfoundland Development Company, who established a mill at Grand Falls in 1909, since which time these mills have provided paper for the Northcliffe publications in England. The cost of installation and erection of the Grand Falls plant was some $6,000,000. The permanently employed staff averages 600 men, while a logging staff of some 1,500 men is employed each winter, when an average of 120,000 cords of pulpwood are cut. Under Newfoundland law, the export of unmanufactured pulpwood is prohibited, but this regulation has been relaxed in recent years, and pulpwood which is cut under contract with the Government, and in relief of unemployment, is permitted to be shipped abroad, an export tax of $1 per cord being imposed.

The issue in the forthcoming general election in Newfoundland, which takes place on May 8, is what is known as the "Humberarm proposition," in regard to which both political parties are in agreement. The scheme has received the approval of the Trade Facilities Act Advisory Committee, who recommended it for guarantee by the British Government to the extent of $9,000,000 provided the Newfoundland Government guaranteed a similar sum, the provision of which is subject to ratification by the Government of Newfoundland after the issue has been determined at the polls. Operations have already begun, and seven hundred men have been employed during the winter putting in a temporary dam and preparing a railway and canal site, eight miles in length, for the conveyance of timber.

The Humberarm scheme will be more of a hydro-electric development than has ever been attempted in Newfoundland. The projected pulp mills will have a daily output of 400 tons of newsprint and will utilize 100,000 h.p. of the 240,000 h.p. which could be developed. Timber areas are favourably situated around the shores of Grand lake, and the wood will be driven to Grand lake, thence through the canal to the slash mill on the Humber river.

LABOUR CONDITIONS

Labour conditions during the past year have not been of the best. The comparatively low price obtained for fish last season necessitated the inauguration of a relief scheme on the part of the Government. Consequently a rock-breaking plant was installed in St. John's, where unemployed might obtain work, and upwards of 1,700 men were engaged in this plant during the winter months. The broken rock thus obtained will be utilized in the building of roads, and the loss sustained by the Government as a result of the venture is estimated at about 40 per cent. With the coming of spring it is anticipated that there will be work for all, and that the tide of emigration to the United States, which has been flowing strongly during this winter, will be checked.

RAILWAYS

There are 1,000 miles of railway in Newfoundland. The railways are owned by the Government, and are operated for the Government by the Reid-Newfoundland Railway Company, Limited, under a contract originally made in 1898, and amended in 1901, and which expires in August, 1951. The railway system consists of a narrow-gauge line, running from St. John's to Port aux Basques, a distance of 546 miles, and branch lines to the various seaboard sections of the country. Such parts of the country as are out of touch with the railways are served by a fleet of coastal mail steamers, operated by the Reid-Newfoundland Company. In 1919 the operating deficit shown by the railways was $1,500,000. During the last twelve months, however, this deficit has been reduced to $750,000, and the hope is expressed that, when the pulp mills are operating at Humbermouth, sufficient additional freight and passenger traffic will be obtained to make the railways self-supporting.

FINANCIAL CONDITION OF THE DOMINION

The funded public debt of Newfoundland on June 30, 1922 (the end of the fiscal year), amounted to $55,030,027. In the year 1913 Newfoundland's imports were valued at $16,012,365, while the value of exports was $14,672,889, and the revenue derived amounted to $3,920,178. During the years of the war, the increased price of fish, and the steady demand for all that could be obtained, served to inflate export valuations enormously, and the general prosperity occasioned by lucrative returns for fish shipments created a demand for a greater volume of commodities than ever before, and imports expanded accordingly. In 1920 the value of Newfoundland's imports had reached the high value of $40,533,388, while exports were valued at $34,865,438, the revenue derived amounting to $10,597,562. Then came the slump, when Newfoundland's fish, offered at controlled prices, became too expensive for European customers, and the imports were reduced in 1921 to $28,909,727, while exports fell to $22,441,267, and the revenue derived to $8,438,040. Again in 1922, even with the supertax of 25 per cent and a 5 per cent sales tax added to imports, the value of the imports further declined to $18,209,853, while exports were valued at $19,478,417, and the revenue derived amounted to $8,269,681. Now that the supertax of 25 per cent on imports has been removed, it is estimated that this will involve an annual loss of revenue amounting to some $900,000.

The volume of business done by the average merchant during 1922 was considerably below normal, but old stocks are gradually being reduced and realized upon, and during the next twelve months there will undoubtedly be a heavy demand for new supplies. The number of insolvencies and general business embarrassments recorded during the year 1922 was less than in 1921, and the amounts involved were also considerably less.

POSTAL RATES

It should be borne in mind by Canadian exporters and manufacturers that the letter rate to Newfoundland is four cents. A great many Canadian firms adhere to the practice of placing only a three cent stamp upon letters addressed to Newfoundland, and this matter has developed to such proportion as to become something of a nuisance. When a letter from Canada, carrying only a three cent stamp, arrives in Newfoundland, it is put aside for the time being in the post office, and is not delivered for a day at least. Then a special carrier takes the letter, and exacts an extra two cents from the addressee. Newfoundland business men have become wearied of continually paying for letters received by

them from Canada, and in a great many cases such letters are refused by the addressee, and are returned unopened to the sender, or go to the dead letter office. That the placing of the proper amount of postage, four cents, upon letters from Canada to Newfoundland is very important may be realized when it is considered that in winter from two to four weeks are sometimes required in transmission from one country to the other. Important business may be side-tracked, and strong opinions are expressed regarding firms who are so careless as not to be conversant with postal rates.

Too much stress can not be laid upon the importance of properly addressing letters. Frequently letters are received in Newfoundland, addressed by Canadian firms to " Newfoundland, Canada," and this blundering method is one that is resented.

CUSTOMS TARIFF OF NEWFOUNDLAND

The duties under the Newfoundland tariff are chiefly ad valorem; the highest rate levied is that of 75 per cent on wheelbarrows, hand-barrows, stand-carts, trucks, trolleys or samsons. With the exception of alcohol and liquors, which are dutiable at the rate of from $3.40 to $4.50 per gallon; and laths and lithographic articles, which bear a duty of 50 per cent; and automobiles, automobile tires and motor car parts, manufactures of tin, agate and hollow-ware, and ready-made clothing of all kinds, including collars and cuffs, which are dutiable at the rate of 45 per cent, the maximum rate of duty may be roughly stated to be 40 per cent. But a surtax of 10 per cent is levied upon all imports, together with a sales tax of 5 per cent upon the invoiced value of the goods plus the freight charges and duty, which makes the tariff a formidable one. As no preference is given to any country, it has no bearing upon the comparative volume of imports entering Newfoundland from the various countries. The following table shows the amounts collected at the various rates of duties for the years 1920-1921 and 1921-1922, together with increases or decreases in each case:—

Ad Valorem Rate of Duty	1920–21	Amount Collected 1921–22	Increase	Decrease
	$	$	$	$
75 per cent	786 00	120 00	....	666 00
60 per cent	9 00	17 00	8 00	....
50 per cent	84,409 00	34,074 00	....	53,335 00
45 per cent	792,699 00	407,021 00	....	385,678 00
40 per cent	1,937,803 00	1,202,480 00	....	735,323 00
35 per cent	2,870,438 00	1,821,681 00	....	1,048,757 00
30 per cent	1,302,787 00	506,501 00	....	796,286 00
25 per cent	898,745 00	358,420 00	....	540,325 00
20 per cent	308,314 00	264,073 00	....	44,241 00
15 per cent	297,049 00	219,516 00	....	77,533 00
10 per cent	934,991 00	282,007 00	....	652,984 00
5 per cent	48,433 00	72,810 00	24,377 00	....

[IMPORTS INTO NEWFOUNDLAND

Imports into Newfoundland from Canada, the United States and the United Kingdom during the Fiscal Year ended June 30, 1922, together with Rates of Duty.

	Canada	United States	United Kingdom	Rate of Duty
	$	$	$	
Aerated waters	1,115	569	1,356	40 p.c.
Acids	1,069	2,024	760	35 p.c.
Oxen, cows and horses	111,426	350	....	20 p.c.
Sheep, calves, pigs	7,881	....	....	$1 each
Lambs and pigs	4,024	....	....	50c. each
Apples (green)	83,258	14,157	....	50c. per brl.
Apples (dried)	1,586	2,022	....	2c. per lb.
Asbestos	1,560	1,339	218	35 p.c.
Baths (all kinds)	5,517	4,858	1,327	40 p.c.
Beans	2,530	16,704	12,522	½c. per lb.
Belting (all kinds)	2,451	7,715	1,166	10 p.c.
Bicycles	462	468	601	40 p.c.
Billiard tables	415	29	409	40 p.c.
Biscuits, soda, butter pilot, etc	2,272	40	790	2c. per lb.
Biscuits, fancy and bread	6,230	393	6,573	40 p.c.
Blocks and sheaves of galvanized iron	1,333	295	27	30 p.c.
Brick, stock or common	43	....	....	$2.50 M and 30 p.c.
Brick, facing and fire	291	896	912	20 p.c.
Brooms and whisks	1,103	356	....	50 p.c.
Broom handles	589	1,208	....	20 p.c.
Brushes	5,500	2,896	787	40 p.c.
Butter	195,458	126	43,016	3½c. per lb.
Cabbage	7,785	1,762	....	1c. per lb.
Cabbage	5,622	5,659	....	½c. per lb.
Cabinetwares	23,745	6,517	7,795	40 p.c.
Cake	16,260	463	461	7c. per lb.
Canoes, boats, etc	417	....	688	35 p.c.
Cans	2,377	23	....	40 p.c.
Sails and tarpaulins	13,258	33,727	1,371	5 p.c.
Carriages	70	85	....	$20 each and 40 p.c.
Carriage wheels	168	284	....	35 p.c.
Carriage, rubber tires	2,324	553	....	20 p.c.
Carriage bows, springs, axles, bolts, etc	2,114	1,739	322	30 p.c.
Herring barrels	497	1,530	....	25c. each
Cast iron pipes	196	821	....	35 p.c.
Cement	24,044	356	6,139	25 p.c.
Cheese	75,967	463	1,560	3½c. per lb.
Chewing gum	12,080	1,590	332	40 p.c.
Cider	599	....	....	20c. per gal.
Clocks and watches	1,460	3,695	432	35 p.c.
Coal	462,566	9,956	109,327	70c. per ton
Coal	560,489	....	12,687	50c. per ton
Coal	....	100,799	....	$1 per ton
Coffee, roasted	2,143	6,672	990	7c. per lb.
Combs	118	3,413	2,308	40 p.c.
Confectionery	125,266	58,872	24,541	6½c. per lb.
Cordage	2,505	20,347	292	1½c. per lb.
Corks and cork wood	603	4,430	605	10 p.c.
Cotton fabrics	2,848	318,605	67,188	35 p.c.
Dry goods	89,026	230,563	114,786	35 p.c.
Dories and dori oars	3,730	2,203	....	20 p.c.
Eggs	62,093	518	....	5c. per doz.
Fancy wares	3,716	23,305	11,005	40 p.c.
Findings for boots and shoes	736	12,895	1,172	25 p.c.
Flannels and serges	1,654	23,545	24,072	35 p.c.
Flour	3,151,670	354,941	....	25c. per brl.
Oranges, lemons, grapes, etc	31,086	67,558	24,295	15 p.c.
Dried, currants, raisins, etc	10,656	81,964	4,616	3c. per lb.
Fur gloves, mitts, etc	2,508	19	25	45 p.c.
Glassware, common window	591	72	12,004	30 p.c.
Glass bottles	3,620	4,304	500	30 p.c.
Plate glass, etc	8,612	17,974	6,072	40 p.c.
Buckwheat	1,014	833	326	1c. per lb.
Cocoa and chocolate	1,105	3,088	13,789	2c. per lb. and 30 p.c.
Lime juice, fruit salad, spices, pickles, baking powder, etc	127,988	81,985	40,954	35 p.c.
Condensed milk	60,626	63,112	441	2c. per lb.
Hats and caps	14,575	33,624	34,326	40 p.c.
Hardware:—Adzes, axes, hatchets, saws, edge tools, etc	18,438	19,681	6,108	25 p.c.
Knives, skates, cutlery, safes, cash registers, guns, rifles, etc	57,129	116,251	25,097	35 p.c.
Anchors, tin, chains, fish hooks, etc	9,385	8,314	33,592	10 p.c.
Boilers, coopers and tinsmiths rivets	2,050	2,872	1,116	20 p.c.
Saddlery	2,385	566	75	40 p.c.
Hay	149,757	2,503	....	$3 per ton
Cornmeal	31,850	45,121	....	20c. per brl.
India rubber boots, shoes, etc	186,071	87,232	4,583	40 p.c.
Long rubber boots	9,340	15,107	....	40 p.c.
Iron in bars and sheets	15,271	9,607	4,094	10 p.c.

Imports into Newfoundland from Canada, the United States and the United Kingdom during the Fiscal Year ended June 30, 1922, together with Rates of Duty—*Continued.*

	Canada	United States	United Kingdom	Rate of Duty
	$	$	$	
Iron and steel railway bars and fittings	2,008	2,792	163	30 p.c.
Iron tubing, wrought or steel	4,439	3,689	699	10 p.c.
Jams, jellies and preserves	2,605	120	6,624	6c. per lb. and 35 p.c.
Jewellery, silverware, etc	3,980	8,853	4,450	40 p.c.
Polish, all kinds, washing soda, etc	8,653	21,917	3,329	35 p.c.
Lard, lard compound	2,791	3,255	....	30 p.c.
Leather, sole	21,836	95,423	1,209	20 p.c.
Upper leather, patent, Japan	9,716	62,365	2,949	20 p.c.
Leather, harness and Morocco	2,769	69	4	25 p.c.
Leather, boots and shoes, leggings, etc	14,125	164,429	13,319	40 p.c.
Locomotives, etc	11,932	20,579	131	30 p.c.
Automobiles, motor cycles and parts	10,536	65,075	2,631	45 p.c.
Lumber, rough	2,875	1,247	....	$4 per M
Lumber, dressed	7,612	2,453	....	$5 per M
Oak, pitch pine, elm, beech, etc	3,390	1,606	....	$1 per M
Laths and shingles	2,189	....	....	60c. per M
Radiators and electrical materials	12,399	57,626	1,356	35 p.c.
Typewriters, sewing and knitting machines	38,302	73,398	31,858	25 p.c.
Wool cards, spinning wheels, steel propellers, etc	988	5,960	12	10 p.c.
Malt	3,443	78	194	10 p.c.
Matches	11,348	10,038	3,854	40 p.c.
Canned corned beef, etc	741	8,313	7,123	¼c. per oz.
Meats, preserved	167	13,650	166	35 p.c.
Meats, fresh	142,440	10	4	2c. per lb.
Poultry and game	46,373	185	21	3c. per lb.
Bacon, hams, tongues and beef smoked cured	5,818	22,228	580	3c. per lb. 10 p.c.
Hams and tongues, dried, salted or pickled	10,932	117,146	....	2c. per lb.
Meats, dried, salted	4,903	9,048	537	1c. per lb.
Beef, salted in barrels	25,466	474,857	....	$1 per brl.
Pigs heads, feet and ribs	2,660	79,084	....	$1 per brl.
Pork mess and rump	30,437	473,472	....	$1.50 per brl.
Medicine	60,404	52,002	47,659	30 p.c.
Surgical and dental instruments	518	1,023	667	25 p.c.
Molasses	87,184	20,661	....	5c. per gal.
Motor engines	1,790	1,667	....	10 p.c.
Nails, cut pressed and wire	5,843	3,097	924	1c. per lb.
Shoe tacks, brads and shoe nails	1,903	2,412	1,492	½c. per lb.
Nails, wrought and horse shoe	7,675	3,311	3,577	⅜c. per lb.
Nuts, almond, walnut, Brazil, peanuts, etc	270	4,397	1,408	2c. per lb.
Nuts, shelled	247	8,246	2,545	4c. per lb.
Oakum	153	724	4,290	1c. per lb.
Oatmeal and rolled oats	42,288	1,830	993	20c. per 100 lbs.
Oats	256,652	40,313	....	5c. per bush.
Oiled cloths	5,904	30,004	9,457	30 p.c.
Oil, kerosene	275,628	24,368	....	6c. per gal.
Oil, gasoline	324,034	29,887	....	6c. per gal.
Oil, lubricating	17,108	11,752	20	8c. per gal.
Oils, essential, axle grease, etc	1,586	21,137	465	25 p.c.
Oils, linseed, spirits of turpentine, etc	10,759	39,217	23,311	15 p.c.
Paint	51,425	55,804	5,739	30 p.c.
Paperhangings and borderings	13,721	3,135	6,261	35 p.c.
Peas, round	7,274	3,953	5,738	50c. per brl.
Peas, split, dried and green	8,713	4,374	24,520	½c. per lb.
Perfumery	8,021	17,895	4,076	40 p.c.
Pianofortes, organs, phonographs, etc	4,207	6,321	1,798	40 p.c.
Potatoes	40,919	467	....	10c. per bush.
Readymades—				
Collars, cuffs, etc	41,719	182,211	63,471	45 p.c.
Rice	1,408	16,828	1,390	½c. per lb.
Salt, dairy and table	4,430	1,107	6,670	10 p.c.
Dressed feathers, ribbons, velvet, lace, etc	76,065	61,180	82,775	40 p.c.
Sewing cotton, buttons, shoelaces, etc	11,202	22,421	79,153	25 p.c.
Soap, common or laundry	15,336	18,501	101,635	2c. per lb.
Stationery, writing paper, etc	85,973	79,154	13,472	35 p.c.
Copy books, slated, etc	167	3,325	3,043	10 p.c.
Printed music	4,275	6,778	800	10 p.c.
Advertising and printed matter	15,259	7,604	901	50 p.c.
Steel, mild	2,733	3,634	3,804	10 p.c
Steel, blister and chrome	196	498	328	30 p.c.
Stoves	8,460	2,002	121	35 p.c.
Straw	2,091	....	....	$2 per ton
Sugar, granulated, white or yellow	201,386	224,706	1,977	4c. per lb.
Sugar, loaf, etc	2,079	1,448	153	5½c. per lb.
Tar	14,841	7,463	410	15 p.c.
Tea	69,383	30,529	95,706	5c. per lb.
Tinware, agata, granite, steel hollow-ware	23,066	10,652	4,898	45 p.c.
Tobacco, manufactured	5,545	67,439	7,044	40c. per lb.
Cigars	1,287	1,210	664	$2 per lb. and 15 p.c.
Cigarettes	164	481	2,958	$5 per lb.

Imports into Newfoundland from Canada, the United States and the United Kingdom during the Fiscal Year ended June 30, 1922, together with Rates of Duty—*Concluded.*

—	Canada	United States	United Kingdom	Rate of Duty
	$	$	$	
Tobacco pipes	139	2,882	2,192	40 p.c.
Trunks, valises, purses, etc	464	5,118	950	40 p.c.
Tweeds, doe skins, etc	4,888	6,047	72,321	35 p.c.
Twines, for sail making	2,236	2,310	4,544	30 p.c.
Turnips, beets, parsnips, etc	9,034	1,840	....	20c. per bush.
Onions, squashes, cucumbers, etc	6,837	10,994	26,672	30 p.c.
Ribbons, dress goods, coat linings, etc	579	21,525	38,468	35 p.c.
Wood pails, wash boards, fishing rods, etc	11,075	6,191	1,045	40 p.c.
Yarn	11,802	770	22,985	20 p.c.
Indian corn	10,167	10,388	....	10c. per 100 lbs.
Machinery for mining purposes	48,055	5,491	1,333	10 p.c.
Oil cake and cattle feed	44,211	35,448	700	10c. per 100 lbs.
Agricultural implements	7,971	1,470	1,635	Free
Books	9,871	9,293	21,085	Free
Coal for domestic purposes and outports	263,525	14,580	661	Free
Printing paper, etc. for printers	2,596	17,472	1,398	Free
Butterine manufacture, oils	10,187	235,544	....	Free
Butterine manufacture, lard	10,611	170,505	....	Free

THE ITALIAN SITUATION DURING JANUARY-FEBRUARY, 1923

Trade Commissioner W. McL. Clarke

Milan, March 24, 1923.—Despite Ruhr events and Lausanne complication, the months of January and February witnessed but little repercussion in Italy. The lira fluctuated only slightly and lost at its lowest quotation but 7 per cent on the United States dollar as compared with a similar French and Belgium franc depreciation of 18 and 20 per cent respectively. Internally, too, confidence was well maintained and Government securities experienced but a fractional Bourse recession.

On January 1 the number of unemployed went up to 382,000, or an increase of 28,000 over the preceding month, which increase is largely accounted for by the season's lack of work in agriculture, and increased again to 391,974 on February 1st. Net investment in joint-stock companies was higher for December than for any preceding month of 1922, and for the whole year there was a net gain of 667 companies and of more than a billion lire in invested capital. During January, 1923, investments still rose. Some 104 joint-stock companies were organized, 80 increased their capital, and investments amounted to 343,965 million lire, while disinvestments reached 101,322 million lire thus reducing the net gain to 242,643 million lire. This is reported to be one of the highest returns since the Armistice. The month of February shows about the same figures of investments, some 242,731 million lire, but a higher amount of disinvestments has reduced the net gain to 119,759,470 million lire.

Business failures during 1922 totalled 3,556 as against 1,783 for 1921, while failures for December numbering 311, were 16 less than for the preceding month. It is since reported that during January failures augmented to 398. Those industries especially busy during January were reported to be the textile mills, more particularly those devoted to the manufacture of artificial silk and cotton goods, and secondly those factories turning out food products. The Government published a series of decrees during January which will encourage shipbuilding, and these subsidies of some 156 million lire will probably be of assistance in brightening the present dull outlook in the metallurgical industry.

Other arrangements are being considered with regard to the definite systemization of the Italian state railways and state telephones which are to be handed over to private industry. These and other arrangements will bring about an estimated economy of some 411 million lire in the State balance. Strikes are virtually non-existent and a greater spirit of discipline is pervading industrial life.

Italian imports for the first eight months of 1922 were valued at 9,927 million lire and exports at 5,602 million lire. Thus the 1922 trade balance for this period showed an improvement of 950 million lire over the corresponding eight months of 1921. During January an important trade treaty was finally negotiated between Italy and Switzerland (this treaty entered into action on February 20), to the lowest customs duties of which Canada as a most favoured nation is also entitled. The Italian tariff on sugar is to be slightly reduced from the 1st of August next, and pay 21·60 lire per 100 kilos instead of 30·60 gold lire as at present.

State revenue for July-December, 1922, was about 120 million lire higher than for the same six months of 1921. Monies deposited in the commercial and issuing banks during October and November, 1922, were some 50 million lire less than during September-October. Note circulation at the end of November was some 250 million lire less than at the end of the preceding month. Exchange was 19·51 to the United States dollar at the 1st of January and closed the month at 20·90, while on February 1st it was at 21·26 and closed at 20·77.

As to the various commodity markets, no considerable fluctuation is reported. On the other hand a considerable advance is verified in security prices especially with regards to cottons and silk, of the 77 quoted on the Milan bourse, 49 moved up 1,302 points, 24 fell 267 points and 4 remained stationary. During February the best market was that for cotton, and also in the security quotation a considerable increase was verified with regard to cotton shares. Of the 78 quoted on the Milan Bourse 50 moved up, 23 dropped and 5 remained stationary.

Wholesale prices dropped 2·37 per cent during the month of January, while on the contrary an increase of 1·94 per cent was certified in the month of February.

DRIED APPLE IMPORT SITUATION IN BELGIUM

Trade Commissioner A. S. Bleakney

Brussels, March 21, 1923.—Following several inquiries from Canada in regard to the demand for evaporated apples, several firms have been consulted and, from information received, it appears that stocks of this commodity are large, both in Antwerp and Brussels. One importer states: "I greatly fear that this season it will be impossible to do business. I have had for more than two months, as well as all my colleagues, a considerable stock of evaporated apples, and it has been impossible to dispose of even a small part of these."

Another firm of importance in Antwerp state that this year the sale of dried apples has been very poor and attribute the situation to the heavy crop of apples in Belgium last year. This firm sells American dried apples. In November last they ordered 2,000 cases and have been able to place only 500 of these. In other years this firm sells about 10,000 cases. Mention is also made of the large production of Belgian apple paste, which sells very cheaply and hinders the sale of dried apples from overseas. This condition is rendered much worse by the cost of the dollar, which is quoted to-day at 17.50 francs. Hopes, however, are expressed that the season of the "Kermesse," which is shortly to commence, will improve the situation.

Prices of American apples (in U.S. currency) on the Antwerp market per 100 pounds c.i.f. Antwerp very recently were:—

Prime slices packed in 50 lb. cases	$ 11 50
Prime slices packed in 25 lb. cases	11 75
Choice slices packed in 50 lb. cases	12 50
Choice slices packed in 25 lb. cases	12 75

The latest approximate freight rate supplied this office from London for evaporated apples is 27½ cents per 100 pounds.

The Belgian duty on dried apples, peeled, is 36 francs. On unpeeled apples it is 12 francs. Waste is 1.50 francs. These duties are per 100 kilos (220 pounds).

American terms are cash against documents, three days, with 1 per cent off and 2 per cent commission.

Canada has not found a market in Belgium for dried apples since 1920, when 53,732 pounds were shipped, to a value of $7,632. The year 1919 is also credited with 57,747 pounds at $7,218. During 1919 and 1920 the demand for all kinds of foods was, of course, very strong.

In January last Belgium imported from the United States only 4,749 kilos, valued at 15,949 francs; from France 10,859, to a value of 9,178 francs; and from Holland, 1,089 kilos, valued at 4,670 francs.

THE APPLE IMPORT SITUATION IN BRAZIL

Trade Commissioner E. L. McColl

Rio de Janeiro, March 21, 1923.—Owing to the low value of the milreis, the cost of apples to the consumer has increased and consumption has dropped to such an extent that the large responsible firms have stopped importing. Some ten thousand boxes are imported yearly at the present time by different Brazilian houses. Unfortunately these firms are not in all cases reliable. Apples are only bought on terms of thirty to ninety days, and the shipper is more or less at the mercy of the importer because even though the draft may be attached to documents, the apples must be handed over to him immediately to be placed in his private cold storage, as the Customs authorities have no cold storage facilities. The importer can therefore get possession of the goods without acceptance of draft should he wish to do so, or failing that, can threaten to abandon the shipment. The apples having been taken out of the ship's cold storage, would immediately spoil on account of the hot climate. There are two experienced and reliable British houses; but both of these firms have stopped apple importation for the time being and will not take it up again until the milreis increases in value.

There are many small importers who are only too willing and anxious to import apples, but as the fruit is so perishable and shippers are so dependent upon the financial reliability as well as integrity of the importer, Brazil cannot be recommended as a good market for apples until the larger houses again interest themselves in this class of importation.

Ninety per cent of the fresh apples imported into Brazil come to Rio de Janeiro. They are brought from New Zealand, Tasmania, and the United States, and are of the highest order of pack with regard to selection for quality, size, colour, etc. Apples from Canada would require to be sent in ships having cold storage facilities.

At present imports can be placed round about 10,000 boxes (of 1 bushel) annually, the season of arrivals beginning in August and ending in February.

From February to June national fruit is plentiful. At one time when fruit was cheaper, imports were much more than double the above quantity. Before the war apples were imported from the United States and New Zealand, but now that the Australian steamers do not call at Rio on the homeward journey, all arrivals in that port are from the United States.

The reasons for diminished imports are principally:—

(1) The constantly rising cost of imported fruit has put it out of the reach of many consumers, especially in the interior, which obtained its supplies from Rio;

(2) Formerly nearly all fruit coming to Brazil was imported through the port of Rio de Janeiro, but shipments are now being made direct to Bahia, Santos (for Sao Paulo market), and Rio Grande do Sul;

(3) National fruit is apparently being cultivated to a much greater extent than formerly, and a great variety of excellent fruit is now being sold in the shops—oranges, tangerines, pineapples, abacates, melons, figs, etc.

The importation of apples in any one year depends to a certain extent on the Portuguese and Spanish grape crops. If grapes are plentiful in these countries, large quantities are shipped to Brazil, with a consequent reduction in the quantity of apples required. Size preferred: 113 to 150 per box; barrels not wanted. Appearance is very important—only dessert apples, no cooking varieties. Qualities: King David, Jonathan and Delicious, and later, Yellow Newtown Pippins and Winesaps. The last two are the favourites.

Duties on fresh apples are at the rate of 100 reis per kilo., payable 60 per cent gold and 40 per cent in paper, with a further 2 per cent port tax payable in gold. A box of apples is reckoned to contain 18 kilos, although with adhering moisture, ice, etc., it very often turns the scale at 19 kilos on discharge. At present exchange the duty on a box of apples works out at about 75 cents.

The names of two reliable British firms (as well as those of Brazilian firms at present importing) may be obtained on application to the Director, Commercial Intelligence Service (quoting file No. 26348).

NOTES ON THE ARGENTINE MARKET FOR WOOLLEN AND SILK TEXTILES

Assistant Trade Commissioner P. W. Cook

II. Silks and Artificial Silks

The Argentine market for silks, both in the form of piece goods and of certain types of manufactured wearing apparel, is of importance. Until shortly before the war practically all imported silks were from Europe, chiefly from France, Switzerland, and Great Britain, but of late years the Japanese have successfully competed and are now well represented in the market. More recently still the influence of the United States has become apparent, in 1918 her total silk exports to Argentine ranked third in importance. While this was the direct outcome of war conditions and the consequent disruption of European industries, it is probable that the United States will succeed in holding permanently a fair share of the market. European nations are regaining much of the piece goods trade lost during the war, but in made-up articles such as hosiery and gloves the United States to-day occupy a commanding position. It is in these lines that Canadian opportunities, given competitive prices, would appear to be most favourable.

LOCAL INDUSTRIES

Argentine silk industries are of comparatively recent origin and are limited to the manufacture of articles of wearing apparel from imported piece goods. In certain lines, however, local industries have either not been established, or in the quality and quantity of their product fall so far short of the efficiency of the United States and European manufacturers, that the market remains, and will probably remain for many years, dependent upon importations.

The Import Market

PIECE GOODS

Generally, all types of silk goods are in demand although, naturally, the popularity of any one class depends upon the fashions of the moment. An important retailer and importer of silk piece goods in Buenos Aires states that France supplied over 70 per cent of the market demand in staple lines of first-grade silks, not only because competition against the qualities of the goods from Lyons and St. Etienne is hardly considerable, but more because of the fact that shades and textures are first made popular in Paris.

The imports of silk piece goods into Argentina in 1920 totalled 322,804 kg., the following being the principal contributing countries: Japan (109,902 kg.), France (105,723 kg.), Italy (35,004 kg.), United States (24,259 kg.), United Kingdom (24,097 kg.), and Switzerland (12,549 kg.). A full range of all classes of silks is represented, as well as artificial silks. Crepe de chine of varying weights is perhaps the type for which there is the largest sale, and is a staple line of import in half pieces of 15 to 18 metres in length, although full pieces of 30 or 35 metres in length are acceptable. Charmeuses are chiefly from France and Japan; the Italian figures are probably made up principally of heavy-weight trimming silks such as taffetas, satins and moirés.

Jersey silk, particularly in light weights, is in constant demand and is largely supplied by Great Britain. Its chief use is for the manufacture of underwear, as the local manufacture of gloves is not very successful, and has failed to compete with the superior production of United States and European manufacturers. Jersey or glove silk is occasionally imported in natural colour and dyed locally, although this method is stated not to be wholly satisfactory and usually expensive. Heavy silk knitted cloth or "punto tricot" is a standard importation from France and Switzerland.

The imports of crude silk, chiefly for the manufacture of men's suitings, form an item of some importance and totalled in 1920, 85,083 kg. The following were the principal countries of origin: Japan (60,722 kg.), United States (10,523 kg.), United Kingdom (4,948 kg.), China (3,907 kg.), and France (3,884 kg.).

While the greater part of the crude silk import is still of Oriental origin, the position of the United States has shown remarkable improvement. Crude silk is usually imported in 48-in. width and in fairly heavy weights.

The pre-war practice of allowing 60, 90 or 120 days' sight has been resumed. French importations are usually quoted at the factory, but those from Japan are c.i.f. Buenos Aires—the preferable method. Japanese exporters also allow about 2½ per cent per piece gratis. The more important wholesalers are in a habit of making an annual visit to Europe or the United States during which they purchase for the coming year, so that, excepting Japanese silks, comparatively little business is done on samples or through the visits of the factory representative.

The initial opportunities for Canadian participation in the piece goods trade would seem to be most favourable in artificial silk and jersey or glove silk in the heavier weights. Assuming a competitive price, these might be sold in natural colour, but if exported dyed, the example of the Japanese, who undertake to match any shade in the French colour card, might be followed to advantage.

UNDERWEAR

The importation of ready-made silk underwear and lingerie are almost negligible, chiefly because of the successful competition of the many small local industries. A few glove silk camisoles and knickers of foreign manufacture are imported, but they form a very small percentage of the total trade. In any event silk underwear is not very popular in Argentina; linen is used to a far greater extent.

SHIRTS, COLLARS, TIES, ETC.

Men's silk shirts are not imported in commercial quantities. At one time silk collars were brought in, but here again local manufacturers have offered effective competition. Ties and general neckwear for men are also made to some advantage locally, as has been pointed out in a previous section, but are still supplied by Europe in better grades. The figures for 1920 indicate importations as follows: Italy, 1,146 kilos; France, 1,179 kilos; United Kingdom, 807 kilos; Germany, 475 kilos. While some of these are probably of artificial silk, it may be assumed that the majority are first-quality articles of genuine silk. There is some chance of doing business in this line if Canadian manufacturers can meet British and Continental competition in price, and if their range of patterns is sufficiently diversified.

In respect of knitted ties also, the market is at present fairly well dominated by Great Britain in pure silk lines, and by Germany in artificial silk. Silk scarves are not classified separately in the Customs returns and it is therefore impossible to determine, even approximately, the present importation. Scarves of British and Italian origin in a wide range of widths and designs are on sale in the better class shops, but it is doubtful if they constitute a standard line of importation. Canadian pure silk scarves might be sold as a specialty by virtue of original design and good salesmanship, but it is doubtful if much could be done in the artificial silk article.

GARTERS AND SUSPENDERS

Silk garters and silk suspenders are products that sell well in Argentina.

The imports of garters in 1920 amounted to 24,439 dozen pairs, the United States (19,327 dozen pairs), United Kingdom (2,157 dozen pairs), and France (1,009 dozen pairs), being the principal countries of origin. Suspenders imported during 1920 totalled 3,848 dozen, France (1,098 dozen), Germany (667 dozen), and the United Kingdom (591 dozen), being the chief countries of origin. The French "Guyot" type of suspender is generally considered the best on the market and the most suited to climatic conditions. Both these lines, however, are also made by local industries from imported silk and silk elastic.

HANDKERCHIEFS

The imports of silk handkerchiefs into Argentina in 1920 totalled 21,552 kg., chiefly from the following countries: Japan (17,703 kg.), United States (1,654 kg.), France (765 kg.), and Italy (668 kg.)

The best business in silk handkerchiefs is in men's goods. These should be hemstitched and in sizes not less than 45 or 48 cm. square. Plain dark colours are in chief demand, although there is a certain sale for fancy designs. Brilliant

bandana patterns, however, are not popular, and white silk handkerchiefs also appear to be losing favour.

For the camp trade artificial silk handkerchiefs of more varied and extravagant design replace the real silk article in demand in the cities. All silk handkerchiefs should be packed in light-paper wrappers of six each, with the size and weight indicated in centimetres and grammes, the designs identified by numbers, and the plain colours by wrappers of similar shade.

BLOUSES, SWEATERS, ETC.

The import of silk blouses for ladies' wear is greatly reduced. As they are not classified separately in the Customs returns, accurate estimates cannot be made, but it is doubtful if more than a few English and French specialties enter the country annually. On the other hand, the import of silk jumpers and sweaters appears to be increasing. In this line artificial silk is almost as popular as genuine silk. Half-sleeve jumpers in white and a wide range of colours are very open crochet or knit, appear to be selling well. Full sleeve coat-sweaters of fancy stitch, in heavy silk and artificial silk yarns, are also much in evidence and are said to come chiefly from France and Great Britain. Generally speaking, if Canadian manufacturers will follow the London and Paris fashion in silk jumpers and sweater-coats, they will probably be able to reproduce them in time for the corresponding period of wear in Argentina four to eight months later in the year.

Corsets have become decidedly démodé in Argentina, but a certain quantity of imported silk types appears still to be sold. Silk brassières, mostly of French manufacture, seem to have replaced them.

PYJAMAS

Pyjamas are made locally from a wide range of materials, not only by the many small independent industries but also by the manufacturing departments of the retail shops. British and French pyjamas are annually imported in some quantities, particularly in heavy silk, and silk and linen mixtures.

Pyjamas are used in Argentina not only for sleeping purposes but also to a great extent for morning use. They may also be worn during summer evenings at home, and even in private railway compartments during day travel, particularly in the hot weather. The general demand is therefore for more substantial material than the very light weights popular in Canada, and for types more closely approximating ordinary house clothing.

Pyjamas of heavy silk or mixture should be made with turned-down collar, cuffs, a patch-pocket, side pockets and three or four buttons down the front of the trousers. Most of more expensive pyjamas are frogged. The draw-cord of the trousers should be fairly heavy in weight. Suits in natural silk with cuffs and collar in a contrasting colour and the usual vertical stripe patterns are equally in demand. Brilliant uniform colours such as pinks or blues are not generally used. There is also a sale for very light weight silks during the hot weather, but this period is generally limited to three months of December, January and February.

Unless to a certain extent among the European population, pyjamas are not commonly used for feminine wear.

GLOVES

Silk gloves are certainly among the most important textile market requirements in Argentina. During the last few years the United States has built up a very large business in this line, almost to the exclusion of European manu-

facturers. That country in 1920 dominated the market, having sent 6,095 kg. in that year out of a total of 7,758 kg., as against 674 kg. for Spain and 562 kg. for Germany.

By far the greater part of the trade is done in ladies' gloves, but there is a certain importation for men's wear although this is said to be diminishing. There is still, however, some sale for subdued patterns, mostly grey, with one or two pearl buttons. In ladies' silk gloves a very wide range is in demand, and, provided it is not too extreme, almost any design will find a sale, from short two-button to ornamented gauntlet types or full lengths carrying 12 to 16 buttons. White is out of fashion; the present popular colours are grey, maroon and beige. The sizes most saleable are from $5\frac{3}{4}$ to $6\frac{3}{4}$. A recent innovation, which is said to be popular, is that of lining the longer types with brilliant colours such as salmon, nile-green or orange.

Canada should attempt to secure a share of the trade. Already one or two trial orders from Canadian manufacturers have reached Argentina and are said to be excellent in quality; but in one instance which came to the notice of this office, the method adopted by the factory of wrapping and shipping so increased the laid-down cost that the final price was prohibitive. If Canadian manufacturers can reduce their export price to that of United States competitors, and will take careful note of the regulations regarding legal weight for Customs assessment (to be detailed in the last part of this report which will appear in our next issue) there seems little reason why business should not be established in this line.

HOSIERY

Pure silk hosiery for men is not much in vogue in Argentina; lisle and linen thread half-hose are more commonly used. But the market for silk and artificial silk hosiery for women is very large, perhaps greater per head of population than in any other country. In this line, as in silk gloves, the United States has built up a most successful export. The following are the statistics:

The importations of silk and artificial silk hosiery into Argentina in 1920 totalled 13,598 kg., the following being the chief countries of origin: United States (5,395 kg.), Germany (2,308 kg.), France (2,172 kg.), United Kingdom (1,482 kg.), and Japan (815 kg.).

One of the most important shops retailing ladies' wear in Buenos Aires state that their sales of hosiery are in the following percentages: pure silk, 45 per cent; artificial silk, 30 per cent; cotton, 19 per cent; wool and wool mixtures, 6 per cent.

Cotton top hosiery is perhaps more readily saleable than the all-silk article, although the latter also sells well. Seamless hosiery is not in demand, as in Argentina as elsewhere it has the reputation of losing shape. For this reason quantities of one-piece hosiery are imported into Argentina, with not only the seam deliberately imitated, but also the indications of thread reduction which is effected on hosiery shaped on the loom. The majority of hosiery both in real and artificial silk is of course reinforced at the heel and toe, and carries a guarantee that the dyes are fixed. Each pair should be ticketed to this effect. The sizes in chief demand are from 8 to 10, but particularly 9 and $9\frac{1}{2}$. In colour black of course ranks first, and at present greys and beige are the most fashionable among other shades. Plain designs are in most common demand, but there is also a good sale for clocked hosiery. Open-work clocks are perhaps more popular than embroidered.

Glove-silk hosiery is in much less demand than thread silk chiefly because of its poorer wearing quality. The exception may be mentioned, however, of "Milanese" glove silk stockings of Swiss manufacture, which are imported in a very fine elastic quality. These are all silk, and come not only plain but also with the innovation of a stamped floral device in several colours on the tops.

In women's silk hosiery, as in gloves, Canadian firms should be well represented in this market, provided they can meet United States prices, will export none but their finest qualities, and ship in suitable containers and on the terms which the market demands.

(The concluding instalment of this report, which will be published in the next issue, will include consideration of tariffs, packing and marking of goods, and sales methods.)

CHINA AS A MARKET FOR RUBBER GOODS

Assistant Trade Commissioner G. A. Rolf Emery

[*The following is the third and concluding report of a series by Mr. Emery on China as a Market for Rubber Goods. The first dealt with Mechanical Rubber Products, and was published in No. 1000, and the second with Waterproof Clothing and Domestic, Sanitary and Surgical Rubber Goods, which appeared in the last issue, No. 1001.*]

Rubber Tires and Tubes

AUTOMOBILE TIRES AND TUBES

It is estimated that in China there are between 8,000 and 10,000 automobiles of various makes. Of that number 4,000 are in Shanghai, 2,000 in Peking and Tientsin, and the remainder in the other chief cities. The low number of cars used can be attributed to the conditions of the roads in the country. The longest run obtainable is between Peking and Tientsin, where there is an improved motor road ninety miles long. One can go from Kalgan to Urga across the Gobi Desert, where there is an automobile transportation service, but no roads have been necessary for that traffic. Motor roads between cities are practically non-existent, and the mileage of improved roads in cities is very small. Good roads run from Shanghai, one of the most advanced cities in China, into the country for only a few miles.

TYPES OF CARS USED

Before the war the types of car used were chiefly of European or British manufacture. This may have been attributable to the greater influence of the European among the foreign element in China. During the war, however, when the European factories were diverted to the manufacture of war materials, United States interests increased their agencies and embarked on an energetic sales campaign. The fall in European exchange post-war greatly offset their efforts, and since that time the European car, with its greater mileage per gallon, has sold in preference to makes from other countries. European manufacturers are also shipping out to China chassis only, upon which Chinese-built body is being put. It is estimated, however, that the American-made cars are in the majority.

OUTER COVERS

The make of the car determines the tires originally fitted, but replacements depend upon the price and popularity of individual makes. Dunlop's with a factory in Japan are in a particularly favourable position to supply replacements at low cost, and they keep the name of their tires constantly before the public. In opposition to them are the Goodyear, Firestone, and Michelin companies who are large advertisers, and the makers of Pennsylvania tires. Annual replacements might be put at four per car, or a total of 40,000 per annum.

TYPES AND SIZES OF COVERS IN DEMAND

On account of the numbers of American-made cars in use, the inch sizes of covers are in greatest demand. The most popular sizes are the 30 by 3 and the 30 by $3\frac{1}{2}$ with their two oversizes, 31 by $3\frac{1}{2}$ and 31 by 4. These four are clincher type, whilst the other sizes of inch tires are both clincher and straight side, with the latter the more popular. The other inch sizes in greatest demand are 32 by 4, 33 by 4, 34 by 4, 33 by $4\frac{1}{2}$, 34 by $4\frac{1}{2}$, 35 by $4\frac{1}{2}$, and 36 by $4\frac{1}{2}$. In the millimetre size tires, which are all clincher type, the 760 by 90, 765 by 105, 815 by 105, 875 by 105, 815 by 120, 820 by 120, 880 by 120, and 920 by 120 are in greatest demand.

The greyish-black cover is to be seen more frequently than the white sided, red tread, red tire and other coloured tires. Fabric and cord are both used, but the cord tire is the more serviceable.

INNER TUBES

The demand for replacement tubes for automobiles is evenly divided between the red and black. The European element in the population ask for the red and the Americans the black, each one taking that to which he has been accustomed. The heavy tubes are most popular.

SOLID TIRES

The number of trucks in China other than ton and ton and a half which use pneumatic tires is very limited, and almost a negligible factor in the trade. Those in use are practically all products of the United States and consequently use inch-sizes in tubes.

[A table of prices of covers, inner tubes, and solid tires, in China, as in February, 1923, has been transmitted by Mr. Emery with this report, and may be obtained by interested Canadian firms on application to the Director, Commercial Intelligence Service, Ottawa.]

MOTOR CYCLE AND BICYCLE TIRES AND TUBES

The use of bicycles in China has not developed as many of the rubber companies expected it to do. One firm profiting by the popularity of the bicycle in Japan, hoped to build up a trade in China similar to what they had in that country. Bicycles were imported which they sold at cost in an endeavour to secure the replacement trade on covers and tubes, but the selling plan was a failure. The Chinese did not take to the bicycle in sufficient numbers to make the scheme a success. The ordinary 28-in. by $1\frac{1}{2}$-in. cover is what is required. It is grey in colour the same as the tube used.

Motor cycles are so seldom seen in China that the sale of tires and tubes is a negligible factor in the imports of rubber commodities. Those in use are mostly of British manufacture and take a grey cover 26 inches by $2\frac{1}{4}$ inches and 26 inches by $2\frac{1}{2}$ inches. The tubes in demand are of the red pattern commonly used in England.

RICKSHAW TIRES AND TUBES

The number of rickshaws in China is estimated at between 60,000 and 80,000. The majority of the tires used in Shanghai are pneumatic, but a few solid tires can be seen on private rickshaws. Solid tires are used to a larger extent in the outports, where, on account of the mud and bad roads, they are more serviceable.

The outer covers for the pneumatic tires, which are greyish black, measure 900 by 50 mm. The inner tube is dark red. The latest laid-down prices are $6.50 for the outers and $1.50 for the inners. The solid tires have 1⅛-inch base and drive on to the rim. They also are in greyish black rubber and cost $1 per pound.

SPECIAL POINTS IN THE TIRE AND TUBE TRADE

The tire and tube trade with China is of a special nature. This is particularly evidenced in rickshaw tires which require special study and investigation before a manufacturer should attempt to work up new business. Many companies have attempted to enter the market after only a cursory examination of the existing conditions, but due to lack of knowledge and to their inability to compete against long-established and highly efficient companies, their ventures have resulted in failure comparative or complete.

The rickshaws are nearly all controlled by large companies in the cities, and in some instances monopolies are enjoyed by individual companies. In consequence the buying of rickshaw supplies is done on a small margin of profit, and only by firms having such advantages as proximity to crude rubber and cheap labour costs, can hope to sell in quantity to the big rickshaw companies.

The organizations most successful in supplying tires and tubes to China keep large stocks on hand for every possible demand, which by effective advertising they endeavour to create. These companies are so efficient and highly specialized in their work, and their products are so well known, that it would require considerable and judicious expenditure on the part of any firm which hoped to drive a wedge into the market.

RUBBER FOOTWEAR

Rubber footwear sales in China do not reach very large proportions as, with the exception of a small quantity of rubbers which is bought by the wealthier class of Chinese, their only appeal is to the foreign population. The largest demand is for canvas and duck rubber-soled shoes.

DUCK, CANVAS AND BUCKSKIN RUBBER-SOLED SHOES

Of rubber-soled shoes the most popular is the duck Oxford tennis shoe. The Oxford style almost invariably takes preference over the high shoe. The white duck upper with the grey corrugated sole shoe, made in the United States, on account of price and finish practically controls the market. The finish is fine, and the style more closely resembles the leather shoe than the makes from other countries.

The price for men's Oxfords made in the United States is about a shilling under the price of those made in England f.o.b. New York and London respectively. The f.o.b. price of men's is G.$0.93 per pair; women's, G.$0.83 per pair; misses', G.$0.78 per pair; and children's, G.$0.68 per pair. For women's, misses' and children's sizes the white one-strap pump is probably equally as popular as the Oxford, although the prices which run f.o.b. New York G.$0.78 to $0.68 respectively are slightly higher on the average. These f.o.b. prices are the lowest offered so far, but there is a second American company which is prepared to sell shoes similar in quality and finish at an average of two cents more per pair.

Men's buckskin red-soled shoes have been imported from England at 17s. 9d. per pair f.o.b. London, but the demand is very small. Probably one of the reasons is that Chinese shoemakers can undersell with made-to-measure shoes, turning out a pair of buckskin red rubber-soled shoes for M.$10 at the most,

slightly over the f.o.b. price of the English makes. The retail price of the English shoe after it reaches China is at least 50 per cent above the retail price of the local product.

White canvas thick rubber-soled shoes come principally from England, where they sell at 9s. per pair f.o.b. London. These shoes are made by the Chinese at from M.$8 to M.$8.50 per pair retail, which at the present rate of exchange makes them an active competitor.

Red-soled canvas and buckskin shoes are worn almost exclusively by the foreign men for tennis and other sports. The red sole, however, will probably be superseded by the crepe rubber which is being put on the English-made shoes. The price, too, is better than for the red rubber shoes, as f.o.b. London for the white canvas shoe it is 8s. 2½d. per pair. The novelty of the pure rubber sole and the lower price should go a long way towards overcoming the present effective opposition of the Chinese product.

OVERSHOES AND RUBBERS

Despite the extremely rainy months in China the sale of rubbers is not very great. The coolie class go barefooted in the summer and in the winter wear a canvas sock-like boot or sock with plaited reed sandals. English rubbers which are coming in sell f.o.b. London at 3s. 7d. for ladies and 4s. 3d. for men's. Similarly the snow boot or overshoe has no utility except in the North where the snow stays, but in which the foreign population is very small.

RUBBER SOLES AND HEELS

Rubber soles and heels are frequently used by foreigners during wet weather. Shoes with Neolin soles are imported, but as yet have made little headway; Phillips' soles are the most popular. The price f.o.b. London for men's stout size is 4s., men's light 3s. 4d., youth's stout 3s., less 25 per cent. The heels cost c.i.f. 1s. 1½d. per pair, and of those imported the American-made heels are the ones commonly used.

A firm in the rubber business which has long been established in China attempted to introduce a complete rubber sole, but they had to give up the venture as a failure. The Japanese could undersell them, and the demand for the sole was handicapped by objection to the extra weight.

CONCLUSION, RUBBER FOOTWEAR

Probably the greatest opportunity for Canadian exporters of rubber footwear lies in the canvas and Oxford tennis shoes. In attempting to supply the requirements of China with the latter, prices equal to or better than the American prices must be quoted for shoes of equal quality. At present two well-known United States firms sell practically all the Oxford tennis shoes required, and no British firm as yet has been able to compete against them. It will be necessary for Canadian companies to ride on the wave of popularity which is expected this season for the crude rubber sole, if they are to sell in worthwhile quantities the canvas rubber shoe. In addition, the chief interest of Canadian exporters should meantime be confined to such articles as hot water bottles, mechanical specialties, domestic, sanitary and surgical appliances and any other lines which may be technical or have novel features to recommend them.

CEMENT IMPORTS INTO BRITISH MALAYA AND NETHERLANDS EAST INDIES

Trade Commissioner A. B. Muddiman

Singapore, February 20, 1923.—During the past five years there has been a fairly steady importation into British Malaya of cement, averaging over 300,000 casks annually in casks which contain 375 pounds net. This importation is due to the number of public works in construction up country and the fairly active line of building operations in Singapore itself, comprising office buildings, etc., which are now under way, and all helping to utilize cement. It is true that the demand fell off somewhat in 1921, but that was due to the slump. However, as conditions may improve in the future and it is hoped that the cost of construction will decline sufficiently to encourage building, it is not improbable that an increase in imports may be shown later.

The total statistics for the importations of cement during the last five years available are as follows:—

Year.	Casks.	Value.
1917	328,000	....
1918	385,000	....
1919	335,000	£401,560
1920	458,000	662,080
1921	370,000	498,630

The principal sources from which these Malayan importations were made are as follows:—

	1920	1921
Hong Kong and China	£190,000	£176,160
United Kingdom	216,200	136,260
Denmark	21,000	66,850
Italy	7,350	58,450
French Indo-China	129,030	40,710
Japan	79,910	10,500
Siam and Siamese States	12,130	....

LOCAL SOURCES OF SUPPLY

How far Canadian cement can be successful in penetrating into this area depends largely on price. As the landed price of cement largely depends on freight rates and local competition, it will be as well to consider first the local sources of supply before going into the question of the prevailing prices to-day. The principal brands available are the Haiphong, the Green Island, the Titan and O.K. Portland cement brands are, of course, well known, and are brought out from England. Hong Kong with her Green Island cement maintains her position as the chief source, but French Indo-China is becoming a formidable competitor. The French Indo-Chinese cement comes from Haiphong, and owing to small overhead charges is becoming a far more important source of supply to-day than it was some time ago. Further, there is a local company manufacturing cement in the Federated Malay States, the Batu Caves Cement Works at Selangor. Quite recently its output declined very considerably, and the writer is informed that it has practically closed down owing to overhead charges being too heavy. The amount manufactured at these Batu Caves Cement Works during the last three years of real activity was: 1919, 4,395 tons; 1920, 5,451 tons; and 1921, 1,768 tons. The Green Island cement from Hong Kong is said to be landed at Singapore at about $5 per cask (Straits Settlements dollar) and $5.55 delivered up country. Price has thus declined, as it has been stated to the writer than in January, 1922, Portland cement (British standard) retailed from $7 to $10 (Malay).

CAN CANADA COMPETE?

As England can still import here, as the latest statistics show, in spite of the above local sources of supply, it may be asked why Canadian cement, if freight rates are not prohibitive, cannot penetrate into the market? The Canadian cement house must consider in answering this question several difficulties. There are two main factors. Unless Canadian firms are able to quote below the Portland Cement Company's prices from England, there is little likelihood, the writer is informed, that business houses in this area will switch over from English Portland cement which is known to Canadian which is unknown. Singapore as a trading community is ultra-English; it is thus very conservative. The Government departments and municipalities will not allow contractors to use supplies in fulfilling their contracts unless the materials utilized are known to them and approved. Therefore everything here is sold by brand. The brand for the Malayan market is one of the most important factors in selling that there is. In fact it is difficult in Canada to appreciate its importance in the East, as it is a fetish which sways every buyer in his commonest purchase. There is no fickleness in the purchaser as far as any particular brand of goods is concerned. He wants that product, and that product only, which bears a particular brand or mark. Consequently, if a Canadian brand of cement were introduced here it would have to sell at a considerably lower price than existing brands, and the merchant house that imported it would have to go to considerable trouble and expense in its introduction.

Besides the question of price and brand, another factor makes it very difficult for the Canadian manufacturer of cement to compete in this area. From England, Hong Kong or Haiphong, the merchant house in Singapore can obtain a fixed date for the arrival of their shipments from any of these places in reply to their orders. From the point of view of shipping, Canada is in a very unfavourable position. In fact direct shipments have occurred so seldom that they are not to be counted on, and shipments by United States ports via the Suez canal are too long. The other main route is shipping to Hong Kong for transhipment to Singapore, but of this route it is said that Canadian products so transhipped at Hong Kong are often delayed there for a considerable period—sometimes even a month. Consequently the Singapore merchant has no idea of the exact date of the arrival of the Canadian shipment in reply to any of his orders for Canadian products.

Australia was in the same position some years ago, but now that she has established a direct shipping line and is able to give fixed dates for the arrival of shipments, she is beginning to do a very flourishing business in various food products and in other lines. The success of Australian flour in this market as against Canadian is greatly due to this factor. Consequently, it may be said that to a certain extent the same factor militates against the Canadian cement manufacturer importing into this area.

It is with regret that the writer, at the present moment at any rate, believes that, although considerable importations of cement are made per annum into Singapore for public works and large private buildings, it is unlikely that the field here promises profitable business for Canadian cement.

Although the above conclusion may seem unfavourable, this office would be only too pleased, from time to time, to make investigations for any Canadian company that desires to watch this market. The writer would impress on all Canadian firms, however, the need of great care when dealing with any Chinese merchant houses or contractors; in fact these should be ruled out of the question as far as this particular trade is concerned.

CEMENT FOR DUTCH EAST INDIES

The field for cement importations here is not limited merely to British Malaya, but in the vicinity there is also Java and Madura, both of which import a considerable amount of cement, as the following table, contained in the latest available figures, will show:—

Origin	Quantity (in Barrels) 1919	1920	1921
Holland	430	10,380	38,189
Sweden	....	112,452	49,425
Denmark	....	15,507	14,169
Great Britain	850	2,704	3,419
Germany	10	2,000	27,611
Belgium	....	7,498	1,341
United States	2,137	11,954	9,607
French Indo-China	13,505	16,335	10,465
Singapore	25	3,073	....
China	35,233	175,999	31,214
Hong Kong	22,111	134,552	35,784
Japan	204,884	240,571	314,201
Elsewhere and unknown	71	23	24,211
Total	279,251	733,048	559,636

As the general depression was very much felt in the building industries in these islands, it is not surprising that imports during the year 1921 were very much lower than in 1920. Still the market was overstocked.

Japan supplied the largest quantity; but as there was an excess in the production of cement in that country prices regularly decreased, and this made it impossible for other countries to compete. The year 1921 opened with a quotation of glds. 17.50 per barrel and closed with prices of from glds. 12 to glds. 10.

FUTURE OF THE RUBBER INDUSTRY

Trade Commissioner A. B. Muddiman

Singapore, March 3, 1923.—The recent report of the Rubber Growers' Association is said to be satisfactory in view of the conditions prevailing. Outside Malaya rubber buyers are said to be anxious as to the effect of the Stevenson restriction scheme. Their fear is that it may not prove sufficiently elastic to safeguard buyers from a possible scarcity. It appears to the writer that perhaps it may only prove a temporary measure. Actually the stocks in London have increased since restriction came into force. This is possibly due to the fact that the scheme has really not had time to affect the supplies which were in hand. The local reasoning why these stocks have increased is because it benefits United States interests to have large supplies available and private agents in London. One of the most influential papers in this area, the *Straits Times,* argues this out in the following way:—

"London still sets the standard of price. Let it be granted that A is a large consumer with control over stocks in London, and that B is a bona fide British dealer. There is a demand for, let us say, 5,000 tons. B undertakes to meet that demand at 65 cents. A steps in and offers to do it at 60. In all probability B drops to that figure, and A serenely walks off. If, however, B is obstinately set on 65 and forces A to show his hand, the latter makes an actual sale from his stock at 60. Whether B yields or fights, the result is to bring the price to A's figure. And A is actually a buyer and only a seller for tactical purposes. He wants to buy 10,000 tons. If B has forced him to sell 5,000, he buys 15,000 instead of 10,000. The effect of the whole transaction is that he has lost nothing by selling, and that he has saved £13 1s. 4d. on every ton he wanted."

INTERESTING NEW DEVELOPMENTS

It is possible that in the near future some interesting developments may take place in the rubber industry. It is stated that owing to the genius of Dr. P. Schidrowitz, "rubber latex can be vulcanized as such and yet be maintained as a stable liquid. In other words, the crude rubber in the latex can be converted into vulcanized rubber without coagulation taking place. The result is a mobile fluid, containing vulcanized rubber 'dissolved' in water." If this should prove to be the case, uses for rubber may be multiplied and quite a change take place in that industry for, as the *Straits Times* reasons, under such conditions, if commercially successful, "we shall scrap all our coagulating tanks and smoke racks, and crepe machines and rolling machinery, and then we shall send tank ships with vulcanized latex all over the world, and most of the machinery in rubber factories in America and England and elsewhere will be scrapped also, and a high quality of goods will be produced and new uses will be found. We have handled specimens of cloth dipped in vulcanized latex and then simply dried. They were perfect waterproofs, for the rubber made itself part of the actual texture, and they were odourless."

INFLUENCE OF LATEX-TREATED PAPER ON PAPER TRADE

One of the effects of this new rubber process may be most strikingly illustrated, if it is successful, from the influence it will have on the paper trade. Latex-treated paper, it is claimed, will have four times the folding resistance of paper not so treated. Again, a piece of newsprint treated with vulcanized latex is said to have been placed under water for sixteen hours and was not visibly affected as regards adhesion or appearance. Advertisers will know the expense entailed on them by the destruction of expensive posters by rain, to cite a small instance. Therefore, it may be possible that a latex-treated poster will be able to stand the most variable climate. On the other hand, it is admitted that rubber as paving, at the moment, is too costly to prove a success in Singapore. According to the Singapore Harbour Board (February 26, 1923), it is too expensive in its initial stages for widespread use.

The future of rubber therefore, during this period of acute depression and restriction, is still fertile with possibilities owing to scientific investigation. The writer cannot, however, foresee that there is likely to be any scarcity of rubber such as existed from 1908 to 1912 as undoubtedly the increased interest in, and the improved methods of the cultivation of, rubber in Brazil is not to be forgotten, although it may not have any immediate bearing on the situation in British Malaya. The planters around Saigon, in French Indo-China, are also stated to be looking forward to a prosperous crop, which at the enhanced prices, due to the Stevenson scheme, should prove most beneficial for the French colony. A big shipment of rubber in latex form was sent, not very long ago, by the General Rubber Company, in a tank steamer from their own estates in Sumatra to New York. Various firms are advertising that quantities of rubber latex preserved with agrisol have also been shipped to England and the United States.

REGISTRATION OF TRADE MARKS IN CHINA

Assistant Trade Commissioner G. A. Rolf Emery

Shanghai, March 10, 1923.—Since the publication in *Commercial Intelligence Journal* No. 989 (January 13, 1923) of a report on the Registration of Trade Marks in China, the writer has been informed that the British member of the diplomatic body in Peking have intimated to the Peking Government that they do not recognize the Trade Mark Registration Bureaus established by them. Such a stand has arisen through the interpretation placed upon Article VII (entitled "Protection and Registration of British Trade Marks in China") of the treaty commonly known as the Mackay Treaty between Great Britain and China respecting commercial relations, signed at Shanghai on September 5, 1902. The article in question reads as follows:—

"Inasmuch as the British Government afford protection to Chinese trade marks against infringement, imitation or colourable imitation by British subjects, the Chinese Government undertakes to afford protection to British trade marks against infringement, imitation or colourable imitation by Chinese subjects. The Chinese Government further undertake that the Superintendents of Northern and of Southern Trade shall establish offices within their respective jurisdictions under control of the Imperial Maritime Customs where foreign trade marks may be registered on payment of a reasonable fee."

At present there is no trade mark law in China recognized by the powers as applicable to their nationals, the only form of registration open to foreigners being that furnished by the Chinese Maritime Customs at Shanghai, where a bureau for provisional registration has been established for some years. (Five copies of each trade mark are required, together with a full description of the purposes for which it is intended. The fee for filing a trade mark or patent at the Customs is M.$7.50). Although such registration is not in itself a guarantee of protection, it may subsequently prove useful as establishing a claim to a particular mark should China at any time pass a trade mark law which is recognized by the powers. A special joint committee of the China Association, Shanghai branch, and the British Chambers of Commerce of Shanghai have recently submitted a draft of a suggested trade mark law to H.B.M. Minister at Peking, who has communicated it to the diplomatic body and the Chinese Government for consideration.

By international treaties and under reciprocal arrangements made through the system of extra territoriality which obtains in China, foreigners are given protection in their own consulates against infringements by fellow-countrymen and by certain other nationalities. This protection is only afforded, however, if the trade mark is registered by the holder in his own country and in the country of the infringer.

PAPER FROM EAST AFRICAN BAMBOO

Experiments conducted at the Imperial Institute with a sample of bamboo, extensive forests of which occur in Kenya Colony, have produced a pulp which was readily bleached and yielded a white paper of good quality says the London *Chamber of Commerce Journal.* Arrangements were thereupon made with a firm of paper manufacturers in the United Kingdom to conduct pulping trials on a larger scale in order to determine the practicability of utilizing bamboo for paper manufacture on a commercial scale. The firm which carried out the trials regard the bamboo as a promising material; but consider that some improvement would result from selecting the stems and keeping those of different ages separate from one another.

TARIFF CHANGES AND CUSTOMS REGULATIONS

Tariff Changes in Belgium

TRADE COMMISSIONER A. S. BLEAKNEY

Brussels, March 19, 1923.—*Matches.*—From March 1 past the tariff on matches has been increased. The old duty was 20 francs per 100 kilos multiplied by coefficient 5, or 1 franc a kilo for wax matches; other matches paid 27 centimes the kilo. (This includes all containers and wrapping.) The new duty is 5 francs the kilo for wax, stearine and similar matches and 2·50 francs for other matches, and it is applicable equally to all countries.

Sugar.—The duties on sugar, raw and refined, are 40 centimes the kilo. Foreign glucoses also pay, since March 1, an additional 20 centimes, bringing the tax to 60 centimes the kilo.

The duties on syrups and molasses are maintained at 20 to 30 centimes per kilo, depending on whether the sugar content is over or under 50 per cent but the duty has been made a fixed duty, the coefficient being abolished, and it is applicable to all sources of import.

Tobacco.—The new increased duties now in force on tobacco are:—

Tobaccos not manufactured	Stripped	Frs. 2.40 the kilo.
	Others including stalks and substitutes	Frs. 1.20 the kilo.

These are double the old duties. All non-manufactured foreign tobacco also pays an excise duty of 80 centimes the kilo (2·2 lbs.).

In regard to manufactured tobacco, the duty on cigars and cigarettes is unchanged, i.e., 12 francs the kilo, but it is now fixed, the temporary coefficient having been abolished. The duty on smoking tobacco is raised from 2·50 francs the kilo to 4·00 francs the kilo, and is also fixed. These new duties are now in force.

The old schedule of excise taxes on cigars, cigarettes and smoking tobacco remains unchanged.

Canadian Shipments to New Zealand via United States Ports

In shipping Canadian goods to New Zealand via United States ports, the only certificate of origin required is the ordinary one as given in F.T.D. Leaflet No. 32, issued by the Commercial Intelligence Service. It is, of course, understood that the goods in question do not enter into the commerce of the United States and are not subject to any process of manufacture while in that country. With reference to shipments of this class, Mr. W. J. Stevenson, Official Representative in New York of the New Zealand Customs Department, gives the following advice: "It would avoid any misapprehension if Canadian exporters when making shipments to New Zealand via New York or other ports in United States of America, stated on their invoices that the goods were being carried by a certain railroad for shipment via New York or other United States ports."

Application of Parcel Post Surtax in Argentina

ASSISTANT TRADE COMMISSIONER P. W. COOK

Buenos Aires, March 8, 1923.—Some discussion has arisen as to the exact application of the parcel post surtax covered by Article 7, Law 10362 of the Argentine Customs Laws. In *Commercial Intelligence Journal* No. 967 (September 13, 1920, page 755), reference is made to a surtax of 25 per cent on postal parcels without mention of any limitation of application. This may give

rise to an erroneous assumption, as the tax in question is not general but is levied only under certain circumstances.

This postal surtax applies to parcels consigned to: (*a*) private persons; (*b*) agents of foreign manufacturers who do not maintain a branch establishment or factory in Argentina.

It does not, however, apply to parcels consigned to: (*a*) the established branch houses of foreign manufacturers; (*b*) established local firms which are not the agents of foreign manufacturers.

It will thus be seen that all postal importations by resident manufacturers' agents who operate from an office or a private address are subject to the surtax, but not importations by established importing houses or branch distributing houses.

The purpose of the surtax appears to be to protect tax-paying establishments which sell their goods under high overhead charges against the competition of small local agents who sell on catalogue. A mail consignment imported by a retail shop or importing house is sold from premises maintained at high expense and subject to heavy taxes, both municipal and federal. Consignments similarly imported by canvassers or local agents, or by private persons who have purchased from the catalogues of agents, are sold under no such expense, and therefore under a decided commercial advantage.

The following is an example of the practical application of the tax:—

One dozen linen shirts, invoiced at $16, are forwarded by mail to an independent manufacturers' agent. The valuation for customs purposes is $24 plus 20 per cent ($4.80), equal to $28.80. Therefore the landed cost becomes:—

Invoice value	$ 16 00
Duties, 40 per cent of customs valuation	11 52
Additional 7 per cent	2 01
Postal Surtax, 25 per cent	7 20
Statistical, warehouse and other minor charges	1 66
Total	$ 38 39

Thus the landed value of each shirt is to the agent $3.20 gold.

Were these shirts consigned to an established importing house, the total cost would be $38.39 less $7.20, equal to $31.19, thus reducing the landed cost to $2.60 each, a material saving.

If, however, the shirts were imported by freight, the landed cost would in all cases be $31.19 irrespective of the consignee.

Import Duties in German Occupied Territories

The British Board of Trade announce the receipt of a telegram from the British High Commissioner at Coblenz reporting that the Inter-Allied Rhineland High Commission had decided to adopt, as from the 25th March, the German Import Tariff, in the form in which it stood in April, 1922.

For imports into the occupied territories of Germany, the duties of the German Import Tariff as it existed in April, 1922, will therefore supersede the present uniform import duty of 10 per cent ad valorem on and after the 25th March.

Commercial Arrangements between Spain and the United States

The *Gaceta de Madrid* (Spain) of November 10, 1922, contains a notice from the State Department to the effect that the Government of His Majesty denounced on November 5 last the arrangement of August 1, 1906, which governed the commercial relations between Spain and the United States. This arrangement, according to the notice, will cease to govern, therefore, on November 5, 1923. Article II of the agreement referred to says: "The products

and manufactures of the United States will pay duty at their entrance into Spain at the rates now fixed in the second column of the Spanish tariff, it being understood that every decrease of duty accorded by Spain by law or in the commercial pacts now made or which in future are made with other nations will be immediately applicable to the United States, exception only being made of the special advantages conceded to Portugal."

Export Control in Occupied Territory in Germany

A cablegram has been received under date of April 9, from the office of the Canadian High Commissioner in London, reading as follows: "*Re* importations from Germany (stop). Goods from Occupied Territory exported to outside countries by way of Rhineland barrier must be covered by export license issued under allied control (stop). In regard to contracts placed before first February full particulars of transaction should be furnished to British High Commissioner Coblenz (stop). If approved after investigation exportation of goods conditional on payment of export duty at rate in force at date of order and not ten per cent ad valorem and no necessity for supplier of goods to apply for export license (stop). Purchaser may pay such duty if supplier be in default."

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain.	:*Emp. Britain*	St. John	April 24
" " "	†*Paris*	New York	" 25
" " "	†*Finland*	"	" 26
" " "	-*Marloch*	St. John	" 27
" " "	†*Olympic*	New York	" 28
" " "	†*Aquitania*	"	May 1
" " "	†*Mongolia*	"	" 3
" " "	*Montcalm*	Montreal	" 4
" " "	-*Canada*	"	" 5
" " "	†*Homeric*	New York	" 5
Ireland only	*Metagama*	Montreal	" 3
France	**Ausonia*	"	" 5
Union of South Africa	**Barracoo*	"	" 5
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela	*Caraquet*	Halifax	April 27
Barbados, Trinidad, British Guiana, Venezuela	**Can. Runner*	"	" 21
Cuba, Jamaica, and Colombia	**Andalusia*	"	" 26
China and Japan	*Pres. Madison*	Victoria	" 20
" " "	*Emp. Canada*	Vancouver	May 3
Australia only	‡*Sonoma*	San Francisco	April 24
Australia and New Zealand	*Mukura*	Vancouver	" 27

† Letter mail only. * Parcel post specially addressed correspondence only.

‡ Letter and Paper mail only. Papers parcel post and specially addressed correspondence only.

: The *Empress of Britain* will also be used for direct mail for the Continent including direct parcel post to France.

Canadian Manufacturers and Exporters are strongly advised to file all numbers of the "Commercial Intelligence Journal" for future reference, and to bind them with the Index at the end of each half year.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING APRIL 10, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement on the nominal closing quotations for all the principal exchanges for the week ending April 10, 1923. Those for the week ending April 3 are also given for the sake of comparison.

		Parity		Week ending April 3, 1923	Week ending April 10, 1923
Britain	£	1.00	$4.86	$4.7701	$4.7493
France	Fr.	1.	.193	.0667	.0673
Italy	Lire	1.	.193	.0502	.0506
Holland	Florin	1.	.402	.4012	.3993
Belgium	Fr.	1.	.193	.0576	.0582
Spain	Pes.	1.	.193	.1568	.1562
Portugal	Esc.	1.	1.08	.0457	.0494
Switzerland	Fr.	1.	.193	.1881	.1863
Germany	Mk.	1.	.238	.000049	.000047
Greece	Dr.	1.	.193	.0127	.0122
Norway	Kr.	1.	.268	.1842	.1828
Sweden	Kr.	1.	.268	.2707	.2709
Denmark	Kr.	1.	.268	.1953	.1931
Japan	Yen	1.	.498	.4931	.4959
India	R.	1.	2s.	.3230	.3213
United States	$	1.	$1.00	1.0175	1.0200
Mexico	$	1.	.498	.4954	.4959
Argentina	Pes.	1.	.424	.3777	.3735
Brazil	Mil.	1.	.324	.1132	.1083
Roumania	Lei	1.	.198	....	....
Jamaica	£	1.	4.86	4.7873	4.7646
British Guiana	$	1.	1.		
Barbados	$	1.	1.		
Trinidad	$	1.	1.		
Dominica	$	1.	1.		
Grenada	$	1.	1.	.9878—.9918	.9843—.9913
St. Kitts	$	1.	1.		
St. Lucia	$	1.	1.		
St. Vincent	$	1.	1.		
Tobago	$	1.	1.		
Shanghai, China	Tael	1.	.708	.7822	.7586
Batavia, Java	Guilder	1.	.402	.3955	.3927
Singapore, Straits Settlements	$	1.	.567	.5647	.5561

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Quebec, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Miscellaneous

1470. Magnesite.—An American firm in Shanghai would like to receive quotations on powdered magnesite, both with and without the colour put in the mix.

1471. De-tinned Scrap.—A firm in Llanelly, Wales, are desirous of being placed in touch with Canadian exporters of de-tinned scrap.

1472. Wrought Iron Tubing.—A London firm who purchase for the United Kingdom market and also for Australia, New Zealand, South America, and the East, wish to get into touch with Canadian manufacturers of wrought iron tubing ¼-inch to 6-inch diameter.

1473. Screws and Nuts.—An importer and merchant of hardware, machinery, tools, etc., in Osaka is anxious to obtain quotations from Canadian exporters of iron wood screws, nuts and bolts, and sends the following inquiries No. 1 and No. 2 for bolts and screws and hopes that some responsible Canadian exporter will be in a position to give service in this connection: No. 1—Best quality black hexagon tapped iron nuts with raised circle-Whitworth threads. Specification, size ¼, 5/16, ⅜, ½, ⅝, ¾, ⅞, 1 inch. Quantity, 10, 10, 50, 100, 80, 100, 20, 30 cwt. each. Total 400 cwt. Price c.i.f. Kobe. No. 2—Iron bright wood screw flat head.

Specification, 2,000 gross $\frac{3}{8}$ by 3; 3,500 gross $\frac{1}{2}$ by 4; 2,000 gross $\frac{5}{8}$ by 5; 3,500 gross $\frac{3}{4}$ by 6; 1,500 gross $\frac{7}{8}$ by 7; 4,000 gross 1 by 8; 1,500 gross $1\frac{1}{4}$ by 9; 2,000 gross $1\frac{1}{2}$ by 10. Total 20,000 gross.

1474. Wood Screws, Sparking Plugs, High and Low Tension Cable, Electrolytic Copper Wire, Silicum Bronze Wire, Electrical Tape, Rubber Goods (Technical Beltings, etc.), Electrical Tools, Accumulators, Cycle Tools.—An important Dutch firm would be very glad to hear from any Canadian concerns interested in exporting the above articles. Terms, prices, and full details.

1475. Steel Rails.—The Canadian Trade Commissioner, Yokohama, has recently received several inquiries for second-hand or relay light steel rails, 45-50 pounds. Inquirers are interested in purchasing about 6,000 tons (approximately 80 miles). Best c.i.f. prices, together with particulars as to the age and general condition of the rails are requested immediately and offers will be put before those interested. Anything from 12 pounds up in second-hand rails is of interest.

1476. General Agency.—An old-established house in Liverpool is desirous of securing agency for Canadian manufactured goods or raw materials.

1477. Plywood, Timber and Lumber; Binder Twine and Rope; Hay and Straw.—A concern in Holland is desirous of hearing from Canadian exporters of the above products. Terms, prices, etc.

1478. Paper and Boards of all kinds; Indurated Fibreware; Plywood.—A London company are open to consider offers from Canadian manufacturers of newsprint, kraft and other wrappings, pulpboards, boxboards, strawboards, building board, tissue paper, indurated fibreware, and plywood.

1479. Inks and Varnishes.—A Brazilian manufacturers' agent wishes to hear from Canadian exporters of inks and varnishes.

1480. Clear Mica Sheets for Stoves.—A Danish firm wish to be placed in communication with exporters of clear sheet mica for stoves.

1481. Umbrellas.—An important Japanese firm write that they saw an advertisement in the London *Times* illustrating a folding umbrella which was manufactured in Canada. This umbrella folds up into a length of about one foot and owing to its convenience would no doubt prove popular in Japan. This firm are very anxious to receive full particulars from maufacturer of folding umbrellas, together with price, catalogues, etc.

1482. Chemicals and Drugs.—A Brazilian manufacturers' agent wishes to get into touch with Canadian exporters of chemicals and drugs for industrial and agricultural purposes.

1483. Timber.—A Manchester firm are open to consider offers of Eastern Canadian spruce and birch planks $2\frac{1}{2}$-inch, 3-inch and 4-inch.

1484. Hardwoods.—A Manchester firm would consider offers of hardwoods, particularly birch, $1\frac{1}{2}$-inch wide upwards.

1485. Maple Flooring.—A Manchester firm inquire for planed maple flooring. Prices must be c.i.f Manchester.

1486. Railway Ties (Sleepers).—A Manchester firm can consider offers of railway ties 9 feet by 10 inches by 10 inches and 9 feet by 10 inches by 5 inches. Prices must be c.i.f. Manchester.

1487. Brass and Copper Wire Cloth.—A large user in the Argentine Republic desires to receive c.i.f. Buenos Aires quotations and samples from Canadian manufacturers of fine copper cloth, required in widths of 18, 20, 24 and 30 inches. Coarse brass, same measurements. Phosphor bronze filter cloth, 24 inches wide. Copper wire mesh, known as Liebermann lining, used in centrifugal machines of sugar refineries and a light rubber covering used for making joints. Further information on application, quoting file 25858.

Foodstuffs

1488. Flour.—A Brazilian firm wish to hear from Canadian exporters of wheat flour.

1489. Flour, etc.—A commission agent of Antwerp wishes to act as representative for Canadian houses exporting flour, grain and derivatives, beans, peas, seeds for sowing and cattle food, and oleaginous seeds.

1490. Flour.—A commission agent in Barbados, with a guaranteed trade to offer the right milling concern, desires to obtain a Canadian connection for flour, in bags of 98 pounds net weight.

1491. Provisions.—A Glasgow merchant with eighteen years' experience of grocery and provision trade desires agency for Canadian exporters of all kinds of provisions and packet groceries, at first on commission basis, and later as buyer.

1492. Oats.—A commission agent in Barbados desires to represent a Canadian house for oats at competitive prices. Samples and prices to be submitted.

1493. Canned Lobsters and Evaporated Apples.—A Swedish firm wish to obtain agencies for Canadian producers of canned lobster and evaporated apples.

1494. Dried Salt Fish.—A Brazilian manufacturers' agent wishes to get into touch with Canadian exporters of dried salt fish.

1495. Atlantic Frozen Salmon.—A London firm of fish importers report an opening for Atlantic frozen salmon and wish to effect a connection with an important shipper.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From Halifax

To Liverpool and Queenstown.—Megantic, White Star-Dominion Line, April 22.

To Plymouth, Cherbourg and London.—Antonia, Cunard-Anchor-Donaldson Line, April 23.

To Glasgow.—Cassandra, Cunard-Anchor-Donaldson Line, April 16.

To Bermuda, St. Kitts, Antigua, Montserrat, Dominica, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad and British Guiana.—Royal Mail Steam Packet Co., April 27 and every fortnight.

To Australia and New Zealand.—Canadian Miller, Canadian Government Merchant Marine, April 20.

To Barbados, Trinidad and Demerara.—Canadian Runner, Canadian Government Merchant Marine, April 21.

To St. John's (Nfld.).—Belvernon, Tri-National SS. Corporation, April 28.

From St. John

To London.—Bosworth, Canadian Pacific Steamships, Ltd., April 21; Canadian Conqueror, Canadian Government Merchant Marine, April 21.

To Manchester (via Halifax).—Manchester Corporation, Manchester Line, April 26.

To Liverpool.—Montclare, Canadian Pacific Steamships, Ltd., April 20; Marloch, Canadian Pacific Steamships, Ltd., April 27.

To Cardiff and Swansea.—Canadian Navigator, Canadian Government Merchant Marine, April 18.

To Glasgow.—Marburn, Canadian Pacific Steamships, Ltd., April 19.

To Glasgow and Avonmouth.—Cabotia, Cunard-Anchor-Donaldson Line, April 26.

To Southampton.—Melita, Canadian Pacific Steamships, Ltd., April 21; Empress of Britain, Canadian Pacific Steamships, Ltd., April 24.

To Cherbourg, Southampton and Hamburg.—Empress of Britain, Canadian Pacific Steamships, Ltd., April 24.

To Antwerp.—Melita, Canadian Pacific Steamships, Ltd., April 21.

To Hamburg.—Hastings County, I.C. Transports, Ltd., April 21; Empress of Britain, Canadian Pacific Steamships, Ltd., April 24.

To Havana.—A steamer, Nagle & Wigmore, April 25.

To Havre and Hamburg.—Hastings County, I.C. Transports, Ltd., April 21.

To Australia and New Zealand.—Atholl, New Zealand Shipping Co., April 25.

From Vancouver

To Yokohama, Kobe, Moji and Shanghai.—Alabama Maru, Osaka Shosen Kaisha, April 19.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Empress of Asia, Canadian Pacific Steamships, Ltd., April 19.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Canada, Canadian Pacific Steamships, Ltd., May 3.

To Yokohama, Kobe and Moji.—Arabia Maru, Osaka Shosen Kaisha, May 12.

To Yokohama and Kobe.—Alabama Maru, Osaka Shosen Kaisha, April 19; Hakata Maru, Nippon Yusen Kaisha, April 30; Tokiwa Maru, Nippon Yusen Kaisha, May 9.

To Yokohama, Kobe and Shanghai.—Canadian Freighter, Canadian Government Merchant Marine, April 30.

To Yokohama, Kobe, Hong Kong and Manila.—Philoctetes, Blue Funnel Line, April 28.

To Yokohama, Kobe, Shanghai, Manila and Hong Kong.—Stuart Dollar, Canadian Robert Dollar Co., April 20.

To India.—Canadian Winner, Canadian Government Merchant Marine, June 20.

To Dairen (Manchuria).—Alabama Maru, Osaka Shosen Kaisha, April 19.

To Honolulu, Suva, Auckland and Sydney.—Makura, Canadian-Australasian Line, April 27.

To Auckland, Melbourne and Sydney.—Hauraki, Canadian-Australasian Royal Mail Line, May 10.

To Auckland, Sydney, Melbourne and Adelaide.—Canadian Skirmisher, Canadian Government Merchant Marine, April 25.

To Liverpool, London, Rotterdam and Antwerp.—Cardiganshire, Royal Mail Steam Packet Company, loading first half of April.

To Rotterdam, London and Antwerp.—Moerdyk, Royal Mail Steam Packet Company, loading late April.

From Victoria

To Yokohama, Kobe, Shanghai, Manila and Hong Kong.—President Madison, Admiral Oriental Line, April 20; President McKinley, Admiral Oriental Line, May 2.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Canada, Canadian Pacific Steamships, Ltd., May 3.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Empress of Asia, Canadian Pacific Steamships, Ltd., April 19; Shidzuoka Maru, Nippon Yusen Kaisha, May 1.

CARBON BLACK: OPENING FOR CANADIAN NATURAL GAS

A correspondent in the *Times Trade Supplement* writes that carbon black is the name now usually restricted to the black pigment of finely divided carbon obtained by burning natural gas in a limited supply of air and allowing the flame to impinge upon a metallic surface.

This pigment has certain unique properties which have long been taken advantage of by the manufacturers of paints, varnishes, enamels, and of printing inks. But it is largely to the rubber industry that the market for this product owes its great expansion during the last seven years, approximately 40 per cent of the total consumption of carbon black being now used in the manufacture of automobile tires and other rubber goods.

The world's annual production is at present 52,000,000 pounds, almost all of which comes from the United States—West Virginia and Louisiana in particular. Nearly 50,000,000 thousand cubic feet of natural gas are yearly required for the industry, an amount that represents 8.72 per cent of all the gas produced and used in the United States.

American firms need 85 per cent, of the total output of carbon black and will probably require an even greater percentage in the future. This leaves a balance of only 15 per cent available for export to England, Japan, Canada, France, China, and Australia, though previous to the war Germany and Austria alone consumed one-third of the yearly production. Canadian imports have been steadily increasing, and now amount to about 2,000,000 pounds, worth approximately $200,000.

Expansion of the automobile industry and additional industrial uses for carbon black are likely to create a demand for this commodity in excess of supply. This, together with the fear of legislation prohibiting or restricting the use of natural gas for carbon black manufacture in the present producing areas of the United States, has caused attention to be directed to the natural gas resources of other countries. In this connection the extensive untapped gas fields of certain northern sections of Canada, particularly in Alberta, should not be overlooked. For though these fields are in sparsely settled areas, where, consequently, the gas will not be needed for the usual domestic and industrial purposes, they are not far removed from railway transportation facilities, and are certainly more advantageously situated than Louisiana in so far as supplying the Oriental markets with carbon black is concerned.

CZECHO-SLOVAKIA INDUSTRIAL REVIVAL

Some improvement is reported in the Gablonz industries, especially in the export of trinkets, beads, and glass bangles to the Far East, says the London *Times Trade Supplement.* The situation in the coal mining district of Ostrava is also improving. Fresh demands are reported in the enamel and felt hat trades. The cotton mills in Eastern Moravia are doing well, and no unemployment doles are being distributed. Moravian shoe factories in Kromeriz have resumed production, while Czech glass exporters are competing successfully with their Austrian competitors. The French occupation of the Ruhr has brought a wave of prosperity to the silk mills in Moravia and Bohemia. Silk ribbons hitherto supplied largely by Barmen are now being produced in the Bohemian and Moravian mills. Until recently these mills were on short time owing to lack of orders—now overtime is being worked.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 285 Beaver Hall Hill, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address Canadian.*

Australia

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil

E. L. McColl. Address for letters—Caixa Postal 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China

J. W. Ross. Address for letters—P.O. Box 300. Office—Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba

Address: 400 and 401 Teniente Rey 11, Havana. (Post Office Box 1290.) *Cable Address, Cantracom.*

France

Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland

Norman D. Johnston, Zuidblaak 26, Rotterdam, *Cable Address, Watermill.*

India and Ceylon

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan

A. E. Bryan, P.O. Box 109 ; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico

C. Noel Wilde. Address for letters, Apartado Num. 126 bis, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian.*

New Zealand

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements

A. B. Muddiman, P.O. Box 121, Singapore. (Territory covers Straits Settlements. British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

Douglas S. Cole, Acting Trade Commissioner, Sun Building, Clare street, Bristol. *Cable Address, Canadian.*

Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States

Frederic Hudd, 44 Whitehall street, New York City. *Cable Address, Cantracom.*

Trade Commissioner P. W. Ward, formerly of Singapore, is at present temporarily attached to headquarters at Ottawa.

CANADIAN COMMERCIAL AGENTS

Australia

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark

C. E. Sontum, Grubbegd, N. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

Vol. XXVIII April 21, 1923 No. 1003

Railroad and Steel Prospects in the United States
Leipzig Spring Fair: Review of the Business Done
Import Trade and its Condition in Newfoundland
Threshers Market limited in Australian Commonwealth
Tariff and Selling Conditions in Textiles in Argentina
Conditions in the Rubber Goods Market in France
The Market for Woollen Textile Products in China
Trade Inquiries for: Flour; Cheese; Canned Fruit; Bacon; Boots and Shoes; Woodenware; Hides; Leather; Stoves; Soda Ash; Wallpaper; Kraft; Underwear

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

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TABLE OF CONTENTS

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CANADA'S PARTICIPATION IN THE BRITISH EMPIRE EXHIBITION

All the plans for Canada's participation in the British Empire Exhibition to be held in London, England, from April 20 to October 31 next year, are practically completed. The Dominion Government will erect its own building —an imposing structure in Neo-Grec architecture—on a commanding site in Wembley Park, where the exhibition is to be held. Work on the erection of the building is to commence this summer, and every last detail linked with this great enterprise will be completed when the exhibition is opened to the public on April 20, 1924.

The building will be 415 feet long and 300 feet wide, with a floor space of 124,500 square feet, and in it, through the medium of attractive displays and exhibits, visitors will have an opportunity to learn in an interesting and impressive way something of the extensive natural resources of Canada, the products of the soil, and the wide range of manufactured articles made within the Dominion. The resources and products of each of the nine provinces and the two territories will be displayed. The Canadian exhibit is to be financed, controlled and directed by the Federal Government. The estimated cost is $1,000,000.

On the same site as the Canadian Government building will be two additional separate buildings, to be built by the Canadian National Railways and the Canadian Pacific Railway, each with a floor space of approximately 10,000 feet. In these buildings Canada's two great transportation organizations will show the attractions and resources of the country served by their railway lines. Plans for all three buildings have been approved by both the Dominion Government and the official architects for the exhibition. When completed these structures will be so prominently located as to be readily seen from any part of the spacious grounds set apart for the exhibition.

Every part of the British Empire will be represented at this great exhibition, to which, it is expected, millions of visitors from all parts of the world will go.

Wembley Park has been chosen as the site of the exhibition on account of its remarkable accessibility from all parts of London. It is fifteen minutes' ride by the tube from Trafalgar Square, the most central point in the Metropolis of the Empire.

THE LEIPZIG SPRING FAIR

Trade Commissioner L. D. Wilgress.

Hamburg, March 13, 1923.—The Leipzig Spring Fair of 1923, which was held March 4 to 10, has shown a considerable falling off in business as compared with the fairs of the last few years. The improvement in the exchange value of the mark and the uncertainty of the political situation were the two leading factors which influenced its material success.

In marked contrast to other fairs the opening days—Saturday to Monday—were very quite. Buyers found prices too high, and foreigners discovered that German prices were no longer substantially below their home prices. The practice then arose in the shoe and leather section, and extended to other branches of the fair, of granting discounts for immediate sales, while in many lines there was a downward revision of prices. This served to attract buyers, and on the Tuesday and Wednesday business became brisk as prices reached their proper level. The last two days of the fair witnessed a general exodus, and a great many exhibitors packed up on the Friday, a day before the regulations allowed.

On the whole the administration of the fair express satisfaction with its results in view of the adverse conditions under which it was held. Home buying was confined chiefly to articles of necessity, but in some lines a good volume of business was done. Export orders were largely for those lines in which German industry has specialized, such as glassware, porcelain, fancy leather goods, toys, ornamental metal goods, pianos, clocks, and certain types of machinery. The chance buyer, who comes to Leipzig with a view to picking up cheap lines, was less in evidence and the orders were mostly placed by firms of standing. While there were fewer buyers from Western Europe and the United States, the Central and Eastern European and Balkan contingent was as large as usual.

In point of actual attendance this year's fair maintained the standard set by its predecessors. On the second day of the fair there was a record number of visitors, but towards the end a great many had returned home, so that during the last days there was not the same number of visitors in evidence as in previous fairs.

It is estimated that the total number of visitors attending the fair was 155,000, of which over 30,000 were from foreign countries. The number of exhibitors was about 14,000, in which respect the fair was practically equal to last year. The foreign firms' exhibitions numbered 680, of which 320 were from Czecho-Slovakia and the remainder mostly from Austria, Switzerland and Hungary.

REVIEW OF BUSINESS DONE

The business done at the Leipzig Fair is usually an excellent barometer of German industrial conditions. As briefly pointed out above, this year's Spring Fair provided a marked contrast to its immediate predecessors. At last year's Spring and Autumn fairs many exhibitors displayed "sold out" signs, while buyers had great difficulties in securing any guarantees of delivery. This year was more a "buyers'" fair. Prices were high, and, owing to the improved value of the mark, buyers held off in anticipation of a reduction. In a number of lines deliveries were offered from stock. Prices for export were invariably quoted in dollars. In all branches of the fair the great shortage of working capital, which is now afflicting German industry, made itself manifest and cash with order was often asked or inducements were made to

pay advances through the granting of liberal discounts. Most of the business was, however, done on terms of cash on delivery. These circumstances had a marked effect on the business done at the fair. There was the usual number of inquiries for prices, but less keenness to place orders. A fair amount of business was done on home accounts, but the buyers were extremely cautious and confined their purchases to articles of urgent necessity. This resulted in a more even distribution of orders throughout the various branches of the fair, as foreign buyers found German prices for regular lines equal to or above world prices and placed orders chiefly for German specialties or articles of luxury, for which the home buying was weak. It was evident that the buyers in most lines anticipated a reduction in prices owing to the improved value of the mark, which sellers were not in some lines willing to concede. As it was, discounts of as much as 25 per cent were made in the shoe and leather and certain other lines before buyers were attracted, while a general instability of prices was marked throughout the fair in certain lines.

In the shoe and leather section good business was eventually done for home account and for export to Eastern and Southern Europe. The same may be said to apply to stationery lines. In heavy machinery little business was done, but machine tools and accessories were sold in fair quantities. Some agricultural machinery was exhibited, but not with a view to any large sale. It would appear that the replenishment of agricultural equipment by German farmers is practically completed. American buyers in the technical section showed most interest in precision tools and instruments and new appliances.

In the textile sections a little business was done on home account, but generally only after reductions in price. Export business was small and confined to Eastern Europe, as German textile prices were found to be higher than world prices. The porcelain firms exhibiting did good business for export, and expressed themselves as satisfied with the results of the fair. English, Dutch, and Scandinavian buying was well maintained in this section, as was also the case with glassware.

In toys there were the usual number of foreign buyers, but prices were found to be excessive in some lines and the business done was probably less than usual. The new United States tariff was said to have adversely affected business in this section of the fair, although large orders for dolls were placed by United States buyers. Many of the American and English buyers went on to Sonnenberg and other toy centres after the fair was over in the hope of obtaining more advantageous prices.

Pianos and musical instruments were sold in fair quantities both for home and export, and prices were said to be still reasonable. In fancy leather goods an excellent business was done for export, and English and American buying was prominent. The same may be said to apply to ornamental bronzes and other fancy cast-metal lines. Austrian firms exhibiting also did good business in this line.

In clocks, plated-ware, and jewellery business for export was good, but the absence of North American buying was said to be severely felt. South America placed good orders for clocks and plated-ware, and the Far East for jewellery.

In cutlery prices were found to be high and business was not as brisk as usual. In household utensils buying was mostly on home account.

On all sides complaints were heard from exhibitors as to the adverse effect of the Ruhr occupation on German industry. In some trades this was felt in the difficulties now experienced in obtaining adequate supplies of raw materials. Thus the fancy leather goods trade is suffering from a lack of certain kinds of skins and of chemicals. Many manufacturers from the occupied area were prevented from exhibiting.

GENERAL CONCLUSIONS

In general it will be seen from the above brief review of the business done at this year's fair in those articles which are chiefly of interest for export, that Western European and American buying was largely confined to lines in which German industry is predominant. The lessons to be learned from the fair would appear to indicate that Germany can no longer readily undersell foreign competitors as a result of the depreciated mark. Henceforth it may be expected that German export trade in general lines will be chiefly with its natural markets in Central and Eastern Europe, while in other markets Germany will mostly sell those products which are recognized to be specialties of German industry.

VISITORS FROM WESTERN COUNTRIES

The absence of North American buying was said to have had an adverse effect on the business at the fair in certain lines. In some cases this was said to be due to the recently enacted United States tariff. The number of Americans visiting the fair was said to be less than a hundred, as compared with over 150 last year. More than 250 British buyers attended the fair, which was about half the number at last year's fair. There was also a reduction in the number of Dutch and Scandinavian visitors, but not to so great an extent. French and Belgian buyers were absent altogether. The writer was able to trace the presence at the fair of four Canadian visitors, two being buyers of a large Canadian departmental store, and the others representatives of Canadian import houses. Several exhibitors reported sales on Canadian account.

ORGANIZATION OF THE FAIR

The Leipzig Sample Fair is an old-established institution, which developed out of the old licensed fair which was held regularly at Leipzig since as far back as 1268. To this fair merchants brought their goods and purchased their requirements. Leipzig was a convenient centre, being situated in the middle of Europe at the meeting place of the trade routes from Bohemia, Poland, and the Rhine. Privileges were given to the Leipzig fair and merchants were guaranteed security. Leipzig therefore became the chief mart of Central Europe. With the development of modern factory production and of railway transport, the fair took on the character of a sample exhibition at which goods were sold from sample. The samples are displayed in modern fair buildings, most of which are in the centre of the old town and resemble modern office buildings, although since the war regular exhibition halls have been erected on the outskirts of the city for housing the Technical and Building Fairs and the Shoe and Leather Exhibit. In 1917 a regular Fair Administration was established by the municipal authorities and the Leipzig Chamber of Commerce, who formerly had been responsible for managing the fair through a joint committee. The Fair Administration owns many of the fair buildings, while others belong to associations or groups of manufacturers who use them for their own exhibits. Public buildings and business premises are also utilized during the fair for exhibits, while temporary structures are erected on the squares of the city. Altogether there are over eighty exhibition buildings and halls, and the total available exhibition space is about 2,692,000 square feet.

Since the war efforts have been made to render the Leipzig Sample Fair more international in character by attracting a greater number of foreign exhibitors. Some success has attended these efforts and several countries have now exhibition buildings of their own. Czecho-Slovakia had this year a very complete exhibit of the country's industrial products. Some 320 firms exhibited

in the Czecho-Slovak building, and the trades represented included Bohemian glass goods, Gablonz bijoutery, porcelain, tin goods, toys, leather goods, buttons, musical instruments, metal goods, laces, hosiery, textiles, pipes, travellers' articles, etc. Good business was reported in certain lines, notably Gablonz goods, buttons and glassware. Austria has also a permanent building at the Leipzig Fair, and this year there were many exhibits, especially of Viennese art metal goods, in which good business was done. Other countries having separate exhibition halls of their own at this year's fair were Switzerland and Hungary, while the Russian Soviet Republic had an exhibition of Russian raw products in the old Leipzig Town Hall.

The Leipzig Sample Fair is held twice a year, beginning on the first Saturday in March and on the last Saturday in August, and lasting until the following Saturday. The Spring Fair usually attracts a greater number of people than the Autumn Fair, but in other respects both are equally important. Besides the general sample fair there is always held concurrently a technical fair and a building fair to demonstrate the latest appliances in industry and the building trades respectively.

Since the war the Leipzig Fair has developed considerably. Since 1917 the number of visitors has increased from 35,000 to 155,000, and the number of exhibitors from 2,510 to over 14,000. Many German firms now find it essential to exhibit at the fair owing to the greatly increased cost of advertising and otherwise canvassing for business in foreign countries. It is believed that the total turnover of business at the fair in one of the good trading years since the war has exceeded a value of $50,000,000.

ASBESTOS IN THE PORTUGUESE MARKET

Asbestos is considered by the Portuguese to be the best material, after magnesium powder, for conserving heat and eliminating dangers of electrical wiring, says the United States *Commerce Reports*. It is used in various forms, from the refined powder to sheets. The powder is made into a thick paste and plastered on to the outside, and at times the inside, of furnaces and stoves. Now that Portugal is beginning to do considerable electrical wiring and insulating, the demand for asbestos has been somewhat augmented. One of the biggest increases in the demand for modern heating in the history of the Republic has been taking place during the past year.

POTATO MARKET CONDITIONS IN THE UNITED STATES

Mr. Frederick H. Palmer, Assistant Trade Commissioner in New York, writing under date April 10, 1923, notes that the *Boston News Bureau of* April 6 reported as follows:—

"March potato shipments on Bangor and Aroostook Railroad were heaviest in ten years, with single exception of March of last year, which was a bumper year. Present total of shipments is now 70 per cent of 1921-22 figures. Month also saw the top price for the season, quotations rising to $3 a barrel from $1.50 at the opening of the month and receding to $2.35 at present.

"A recent sudden jump from 50 cents to $1 a bushel for potatoes within twenty-four hours has proved a boon to farmers on western reclamation projects, say reports to the Interior Department. The sudden rise, due to orders from the eastern market and western seaboard, it was said, will take all potatoes stored by these growers last year on account of low prices before the June crop matures."

UNITED STATES RAILROAD AND STEEL PROSPECTS

Frederick H. Palmer, Assistant Trade Commissioner in the United States

New York City, April 11, 1923.—Perhaps the two most conspicuous indications of the present period of increased industrial activity are the dimensions of pig-iron output and of railroad freight car loadings. These accepted indices of the volume of industrial activities continue to trace new upward lines.

RAILROAD SITUATION

In eleven weeks of this year the railroad companies of the United States have loaded 9,374,662 cars as compared with 8,160,358 for the same period a year ago, and 7,778,055 in 1921.

During the week ending March 24, 917,036 cars were loaded. Of these cars, 61 per cent were loaded with general merchandise, 20 per cent with coal, and 8 per cent with forest products.

ACTION OF RAILROAD COMPANIES

That this is a real problem to be attacked with all vigour and without delay is evidenced by the action taken this week by the Association of Railway Executives. This organization voted to carry out a billion dollar railway improvement programme this year. The programme contemplated proposes distributing this appropriation as follows:—

	1923	1922
	Millions of Dollars.	
Cars	515	200
Locomotives	160	45
Trackage, etc.	425	195

This balanced budget indicates the keenness of the railway heads both to add to equipment of cars and engines and to extract the maximum use from the existing total. The prospect now is that the railroads will this year add 3,000 locomotives and 125,000 cars to their equipment, in bright contrast with slightly under 1,400 engines and 50,000 cars in 1921 and but few more of either in 1922.

OPERATING PROGRAMME ADOPTED

In conference, the railroad executives further approved a number of measures for improving railroad service and the various companies pledged themselves to carry them out.

These proposals are based on the fact that traffic becomes densest about October 1, and insist that, by this time, the amount of rolling stock awaiting repairs should be reduced to the normal basis and that all railroad coal storage operations should be completed.

It is also proposed that greater attention should be given to the movement of coal and ore via the lakes, and that road and building construction work should be completed as early in the season as possible, to relieve equipment for the larger movement of seasonal commodities. It was also resolved that those interested should be impressed with the necessity of loading all cars to maximum capacity and that every possible means be adopted to increase the mileage of cars per day to an average of thirty for the whole country. This conditioning programme is to be prosecuted primarily with a view to moving the grain and farm products next season, and thereby decrease the congestion of freight during the crowded months—September to November—to which desirable end the public are requested to co-operate.

PIG-IRON PRODUCTION

Quite in keeping with the aims and desires of the transportation companies to avert a serious car shortage is the steadily increasing output of pig-iron. March production set an absolutely new record in the volume of iron coming from the furnaces. This production totalled 3,521,275, according to *Iron Age*, contrasting with a monthly average last year of 2,250,000 tons and 1,390,000 tons a month average in 1921. This production exceeded the 3,508,849 tons war-stimulated record of October, 1918.

DOMESTIC CONSUMPTION INCREASING

It is realized that a large part is played in this activity by the demands of the railroads for equipment of all kinds, and the programme outlined above suggests that, in so far as the railroads are concerned, the demand will be maintained at least until October.

Similarly all signs indicate a continuation of the heavy demand for building materials for at least six months. Building last year consumed 13·5 per cent of the steel produced as against a so-called normal consumption of 14·2 per cent of steel production.

The automobile industry, which normally absorbs about 9·8 per cent of the steel, points to an even greater demand. Production and shipments have continued in large quantities throughout the winter and will probably assume larger proportions as the better weather arrives.

EXPORT TRADE DIMINISHING

These three examples of increasing consumption with production practically at maximum capacity indicate that the greater bulk of the steel business is of domestic origin; but while the railroads, automobile and building trades are furnishing the main demand, exports are far lower than even a year ago. This side of the steel business is its least satisfactory phase, but it will probably be given more attention as the domestic demand declines.

Just how long these thriving activities of the railroad and steel industries will continue is a debatable point, but prevailing opinion is practically unanimously optimistic and predicts a continuance of present conditions well towards the end of 1923 or even longer.

ECONOMIC CONDITIONS IN SWITZERLAND

In common with the rest of Europe Switzerland is still experiencing, in no small measure, the effects of the crisis consequent upon the general commercial upheaval caused by the war. According to the *Bulletin Official* (Lausanne) this business slump still continues without it being possible as yet to prophesy a definite change in the situation or even a permanent improvement in this transition period, which threatens to last a very long time. It is further pointed out that this state of affairs is all the harder for Switzerland as it possesses a sound currency and cannot, therefore, protect itself without great difficulty against the competition of those countries with depreciated currencies. Strong efforts have been, and are being, made to retain the country's foreign markets and the spirit of earnest endeavour, which has been so manifest, was rewarded by a large decrease in the number of unemployed during 1922—from 150,000 to 74,000. Wages have also been reduced. The climax of the country's struggle, however, appears to have passed, and all branches of trade and industry are eagerly awaiting the long overdue general trade revival.

LIMITED MARKET FOR THRESHERS IN AUSTRALIA

C. Hartlett, Office of the Trade Commissioner

Melbourne, March 19, 1923.—As the result of recent investigations made by this office on behalf of Canadian manufacturers of grain-threshing outfits desirous of securing business in Australia, the following results are submitted for the information of the agricultural implement industry in general.

The demand for threshers in Australia is a very limited and diminishing one, being practically confined to those of medium size and to certain sections where climatic conditions are not favourable to the methods of harvesting in vogue generally throughout the country. Some years ago the thresher was in more general use, but has gradually been displaced by the stripper harvester and reaper thresher, hence it is now difficult to interest dealers in the machine.

Of the two leading threshers on the market, which command the bulk of the sales, one is of United States manufacture and the other made in Australia. The first, with tailing elevator, bagger, 14-foot straw elevator mounted on truck including pole neck yoke, two horse trees and brake, sells to the farmer for £150 on four months' terms and at £142 10s. for cash. On longer terms the price ranges from £155 for sixteen months to £163 for twenty-four months' settlement. The weight of the machine, ready for the field, is 22 hundredweight (112 pounds) and 26½ hundredweight in original packages. The Australian machine is a complete thresher and cleaner with 16-foot straw elevator, and sells at £120 with £5 off for cash, or at £125 for one-third cash and the balance within twelve months. The weight of this machine, ready for the field, is 14 hundredweight.

It is understood that when first introduced in this country, the United States machine required considerable experimental work to adjust it to Australian conditions, which differ materially from those in America. No doubt expert advice in that direction would also be necessary before a machine built for Canadian conditions could be adapted to meet Australian requirements. This, coupled with the necessity of maintaining a special selling staff in a limited market with strong competition of established machines of proved merit, are the main factors which have created a reluctance on the part of dealers to consider propositions to handle unknown threshing machinery of oversea origin, despite the fact that recent quotations on Canadian threshers show that they can be landed duty paid in Australia on a competitive price basis.

The United States machine referred to is handled by the Australian branch of an American agricultural machinery company with a powerful selling organization in this country. The local made machine is sold to the farmer by the manufacturer through agents in grain districts on a commission basis.

Owing to the inclusion of threshing machines under a very general classification for statistical purposes, the actual number imported annually into Australia is not ascertainable. There is no customs duty on those imported from the United Kingdom, but on all others (including Canadian) the rate is 11 per cent net.

MARKET CONDITIONS IN CHILE IMPROVING

For the greater part of a year reports of Chilean business conditions have been generally encouraging and that country's business outlook during March has not grown less optimistic, says the United States *Commerce Reports*. Just as in other recent months, the improvement in March was gradual, without any spectacular features. Nitrate sales are holding up well. The exchange market is active, with the local currency increasing in value. Losses are less, while imports during the current month are greater in volume than in either January or February. Bank collections are reported easier.

MARKED INCREASE IN INDIAN IMPORTS OF TREASURE

Trade Commissioner H. A. Chisholm

Lahore, March 14, 1923.—A notable feature of India's trade in recent months has been the remarkable increase in the imports of treasure. Bankers throughout India report that gold and silver are entering the country in almost unprecedented quantities. This is borne out by the Customs returns which show that India is now importing treasure at the rate of around $20,000,000 per month. During the ten months ending January, 1923, the value of the treasure imported amounted to nearly $140,000,000, or over double the figure for the corresponding ten months of the previous fiscal year. Of this total gold bullion accounted for about $60,000,000, British gold coin $23,000,000 and silver $47,000,000.

INDIA'S FAVOURABLE BALANCE OF TRADE

During the ten months ending January, 1923, exports of merchandise from India amounted in value to over $740,000,000, while imports of foreign merchandise amounted in value to $560,000,000, leaving India a favourable balance of trade in merchandise of over $180,000,000 as compared with an adverse balance of $90,000,000 and nearly $200,000,000 during the corresponding ten months of 1921-22 and 1920-21 respectively. After transactions in treasure, sterling transfers, Council Bills, etc., have been taken into account, India's total visible balance of trade amounted to over $60,000,000 during the ten-month period ending January, 1923, as compared with total adverse balances of $95,000,000 dollars and $110,000,000 respectively during the corresponding ten-month periods of the two previous years.

The total of India's foreign trade in private merchandise during this ten-month period was over $1,300,000,000. If imports of gold and silver bullion, destined largely for use in the arts and crafts, are included, the grand total of India's foreign trade during the ten-month period is not far short of a billion and a half dollars.

EMPIRE COTTON GROWING

According to Mr. W. H. Himbury, the managing director of the British Cotton Growing Association, says the London *Times Trade Supplement*, the prospect of the Empire becoming self-supporting in regard to supplies of raw cotton is not so remote as might be supposed from a comparison of present Empire production and consumption. Mr. Himbury, who has just returned from a three months' tour of the cotton-growing areas of India and the Sudan, thinks that if the large irrigation schemes in hand or proposed prove successful in making a larger acreage available for cotton growing the Empire might produce enough cotton for its own requirements in a very few years. Mr. Himbury considers that the prospect of producing cotton of the American type are greater in the Sudan than anywhere else, but the water problem dominates the situation. With a regulated water supply the Sudan should produce 1,000,000 bales in place of the 40,000 to 50,000 grown at present, and the yield per acre in the Sudan is double that obtained in India.

TRADE CONDITIONS IN NEWFOUNDLAND

By A. E. MacEachern, Junior Trade Commissioner

II. The Import Trade

IMPORTS FROM CANADA

During the fiscal year 1917-18, the value of the imports of Newfoundland from Canada was $11,107,642; those from the United States were valued at $12,241,946, and from the United Kingdom $2,248,781. In the year 1919-20 imports from Canada were valued at $18,767,238, as against $15,414,067 from the United States and $4,637,074 from the United Kingdom. The drop in fish prices was responsible for the decreased returns in 1920-21, when imports from Canada were valued at $14,841,561, as against $9,556,244 from the United States, and $3,230,305 from the United Kingdom. The year 1921-22, when the slump in fish prices had affected all classes of the people, witnessed a further great decline. Imports from Canada in that year were valued at only $9,077,168, as against $6,127,958 from the United States, and $2,036,218 from the United Kingdom, and the imports from all countries totalled only $18,209,853, or more than half a million dollars less than Canada had exported to Newfoundland in 1919-20.

PRINCIPAL IMPORTS FROM CANADA

Of the $9,077,168 worth of goods exported from Canada to Newfoundland in the last fiscal year, foodstuffs accounted for $5,811,118, the principal item in which was flour, to the value of $3,151,670. Coal imported from Canada, upon which duty was levied, was valued at $1,023,055, while coal imported from the Dominion for use in the outports, entered free of duty, reached $263,525. The value of manufactured articles which Canada exported to Newfoundland last year was thus $1,979,470. Despite the handicap of greater distance, the United Kingdom sells more manufactured articles in this market than does Canada, and the United States to a valuation three times as great.

PRINCIPAL IMPORTS FROM THE UNITED KINGDOM AND THE UNITED STATES

Among the items in which the United States or the United Kingdom, or both, supply the bulk of the requirements of Newfoundland, are the following: cordage, cotton fabrics, dry goods, hats and caps, knives, cutlery, cash registers, guns and rifles, long rubber boots, jewellery and silverware, polish (all kinds), leather (sole and upper), leather boots, shoes and leggings, locomotives, automobiles and motor parts, radiators and electrical materials, typewriters, sewing and knitting machines, linseed oil and spirits of turpentine, paints, perfumery, readymades, collars and cuffs, sewing cotton, shoe laces, laundry soap, manufactured tobacco, trunks and valises, tweeds, doe skins, ribbons, dress goods and linings, printing paper, butterine oils and butterine lard. Bacon, hams, and beef, salted in barrels, and mess and rump pork are imported into Newfoundland almost wholly from the United States. The fact that Canadian firms do some business with Newfoundland in each of the above-mentioned lines should encourage effort to obtain a greater share of the trade. A large proportion of these lines admit of summer shipment, and with the excellent steamship services provided from Montreal, North Sydney and Halifax during the summer months, the opinion may be expressed that energetic action on the part of Canadian exporters would be fully repaid. (A list of Newfoundland importers of any commodities may be obtained on application to the Director, Commercial Intelligence Service, Ottawa.)

NOTES ON VARIOUS IMPORT LINES

[*For valuations of imports into Newfoundland in the lines enumerated below (and in other lines) from Canada, the United States, and the United Kingdom, during the fiscal year ended June, 1922, with the respective rates of duty, see the last issue of this journal, No. 1002, pages 596 to 598.*]

India-rubber Boots, Hose, etc.—Prior to the war, practically all the rubber boots and shoes used in Newfoundland were imported either from Canada or the United States. Gradually, as Canadian exchange depreciated in comparison with that of the United States, that country dropped almost entirely out of the market.

About a year ago a large firm in Edinburgh, Scotland, sent a representative to Newfoundland, and as a result this company are now quoting a rubber under Canadian prices, although they are handicapped by high freight rates and packing charges. This rubber has been on the market for the past year, and various retailers who have handled it state that they have had no complaints concerning its wearing qualities. Two United States concerns are making a determined effort to increase their trade in long rubber boots, and especially in those of the hip variety, in which one Canadian firm are doing an excellent business.

The market for rubber hose is a ery small one, and, as the imports are bulked with India-rubber goods in the Customs returns, it was impossible to obtain any reliable data concerning the imports. Except for that used by the fire department, which is imported from the United States, and such as is used for washing windows, there is little market for hose in the Dominion.

Belting of both rubber and leather imported into Newfoundland is at the present time chiefly from the United States. The belting is used by the clothing and boot and shoe factories in St. John's and in the outports, and by a cordage company in St. John's. Heavy stocks are already carried by the hardware sections of the principal department stores. In order to assist home production in the industries in which belting is used, belting is permitted entry at a low rate of duty, only 10 per cent being levied upon it, plus surtax of 10 per cent of the duty, plus sales tax of 5 per cent of the invoiced cost, the amount of freight and duty paid.

Retailers in St. John's were of the opinion that it would hardly be possible for Canada to compete with the United States in rubber-soled canvas shoes, as only a very small number of the cheaper grade are imported.

Automobiles and Tires.—There are some 450 automobiles in Newfoundland, the greater proportion of which are owned in St. John's. Radiating from St. John's is a system of highways covering most of the peninsula of Avalon, which affords opportunity for motor trips for hundreds of miles in various directions, and the highways are being steadily improved. The general business depression is reflected in the decline of imports of automobiles and parts in 1921-22, the bulk of which were from the United States; but advantageous steamship connections during the summer months should make for the building of a greater volume of business by Canadian exporters. Canadian tires have stood up well under the severe tests to which they have been subjected on the roads of Newfoundland, and one Canadian firm is making a determined effort to obtain a fair share of the trade.

Furniture.—Stocks of furniture carried by stores in St. John's are still very heavy, large quantities having been purchased in 1919 and 1920. In this line Canada holds the bulk of the trade. There are three furniture factories operating in St. John's, turning out a cheap product, against which outside manufacturers are finding it difficult to compete.

Hardware.—United States firms have become firmly established in the hardware trade of Newfoundland. Prior to the war, Great Britain dominated the trade, but such articles as steel planes and carpenters' braces are bought much cheaper from the United States than from other countries, and are of good quality and pattern. One Canadian company sold a quantity of edge tools, axes, etc., through the efforts of a traveller sent to Newfoundland last summer, but the writer was informed that other Canadian firms had rather neglected the market. Freight rates from New York to St. John's are 70 cents per cwt., as against a rate of 50 cents per cwt. from Halifax and Montreal, but inland freight in the case of Canadian supplies does not leave any appreciable advantage in this direction. There are, however, possibilities for Canadian manufacturers of hardware in the Newfoundland market An aggressive sales campaign through direct representation is required, and the importance of having representatives of Canadian firms visit the colony cannot be emphasized too strongly. In the matter of catalogues United States firms show more advantageously than do Canadian, as these are printed on excellent paper, attractively gotten up, and giving full details of prices and terms.

Flour.—The great percentage of Newfoundland's imports of flour are obtained from Canada. The practice is for Canadian flour merchants to quote Liverpool prices to their customers, and the superior quality of the Canadian product assures a great preponderance of sales.

Meats.—In poultry and game Canada supplies the bulk of the Dominion's requirements. But beef, salted in barrels, which is so largely used by the fishermen, is supplied to a large extent by the United States. One reason cited for this is that choice cuts of meat are in great demand in American cities, and the parts for which there are fewer inquiries are utilized for salting. Canadian packing houses, however, should be in a position to obtain at least a portion of this trade; and same holds true of pork. Pickled pork is not put up to any appreciable extent in Canada, but it would appear that the extent of the Newfoundland market would justify her doing so.

Butter.—Some years ago New Zealand and Danish butter undersold the Canadian product in Newfoundland and practically forced it out of the market. Canadian butter, however, is well liked and will be difficult to supplant in future.

Glassware.—In common colourless window glass the United Kingdom and Belgium share the bulk of the trade, while Canada and the United States are the principal sources of supply for empty bottles for manufacturers' use. Plate glass, silver glass, etc., is supplied principally by the United States, with Canada and the United Kingdom together furnishing the bulk of the remainder.

Leather Boots and Shoes.—United States boots are preferred in the Newfoundland market for the reason that the cheap qualities featuring the latest styles are obtainable from American jobbing houses. Water street shoe merchants this spring were showing a nice-looking boot manufactured in one of the Middle States, which they were offering at $4.95. Appearance and price are the principal factors considered by buyers, while quality is apparently a minor consideration.

Ready-made and Dress Goods.—The United States now supplies the bulk of Newfoundland's importations of ready-mades, in which style and price are the governing factors. It is the practice for Newfoundland buyers to visit New York jobbing houses annually, and the bulk of their purchases are made on these occasions. In the better class of heavy woollens the United Kingdom still maintains the upper hand, but in cotton dress goods and cotton and woollen mixtures the bulk of the supplies of the Dominion are of United States origin.

Underwear.—The red and blue label brands of underwear manufactured by a well-known Canadian house are the best sellers in Newfoundland, and another Canadian firm formerly did a fair business also. Fleece-lined underwear is supplied principally from the United States, but is not now nearly as commonly worn as it was some years ago. Summer underwear of the B.V.D. type is supplied almost entirely from the United States.

Caps and Jerseys.—There is an excellent market in Newfoundland for Canadian-made hats, caps and knitted goods. Caps are greatly worn in St. John's, and were supplied last year by the United States to the value of $33,624, as against $34,326 from the United Kingdom and $14,575 from Canada. The United States style of cap, which is identical with the Canadian, is preferred to that supplied by the United Kingdom. Canadian-made jerseys are also greatly in demand, and there appears to be an excellent opportunity for greatly increasing Canada's exports of knitted goods to Newfoundland.

Paperhanging and Bordering.—Canadian-made wallpaper has by far the largest share of the trade, and in the event of the seal and cod fisheries proving successful this season, demand should be greatly augmented.

CONCLUSION

The future of Newfoundland, as has been stated, is almost entirely dependent on the fortunes of the cod fishery. The development of the pulp and paper industry, especially those now operating at Grand Falls, and the projected development at Humberarm, will also have an important bearing upon the general prosperity of the community. There seems little hope for any reduction in Newfoundland's especially high rate of taxation. The Humber project, which seems assured of approval by the mass of the population, will occasion the raising of some $9,000,000 by the Government, as the Dominion's share of the guarantee, and in the immediate future the per capita tax, which has stood at $36, will be materially increased.

The determined efforts being made by United States and British exporters to extend their business in Newfoundland necessitates the paying of more attention to this important market by Canadian exporters. The principal banking business is conducted by Canadian banks, and the managers of these institutions are unanimous in expressing the belief that direct representation is necessary if Canada is to hold her own in this market, in which geography has given her the advantage. The appointment of a local agent does not work out satisfactorily in the majority of cases, as this agent generally handles United States and British lines as well.

The travelling salesman in St. John's who expects to exhibit his samples hurriedly from store to store and get away on the next steamer is doomed to disappointment. Time is necessary if results are to be obtained. If, however, the traveller makes a good impression, and has a suitable line to show at a competitive price, he will be successful in obtaining an initial order, which may lead to considerable further business in the event of deliveries being prompt and goods supplied being up to sample.

Commercial travellers showing their wares in St. John's are required to pay a maximum tax of $50 during the six months January to July, or $25 during the six months' period July to January; but this levy, while appearing large at first sight, has little effect as it is the consumer who pays in the final analysis. It is the practice of buyers for Newfoundland business houses to visit Canada, the United Kingdom and the United States annually. Great care should be taken by Canadian firms in making sure that postages on their mail to Newfoundland—letter rate 4 cents for the first ounce and 3 cents for each additional ounce—are adequate in order that their correspondents may not be subjected to the annoyance of having surcharges to pay.

Too much stress cannot be laid upon the necessity for direct representation, as one may learn more of the possibilities of the country through a few days' personal investigation than may be obtained through reams of correspondence. United States exporters are "nursing" Newfoundland trade, and it has been impressed upon the writer, during his visit, that Canadian firms should be able to compete effectively in a great many lines in which the United States now exports the bulk of the Dominion's requirements. Investigation of the possibilities of the market, and a strenuous endeavour on the part of Canadian exporters to know its requirements, would undoubtedly justify the comparatively small outlay involved.

MARKET FOR WOOLLEN TEXTILES IN CHINA

Trade Commissioner J. W. Ross

Shanghai, March 10, 1923.—The market for woollen textiles in China compared with that for cotton cloth is small, but it is a trade which will likely expand as the style of men's clothing changes, due to the adoption of foreign dress and a consequent demand for the suitable materials for that purpose.

CHINESE CLOTHING

In former times woollen textiles were scarcely used in Chinese clothing, silk and cotton being almost universally employed. The clothing of the leading merchants and the better classes was of silk, and no one of standing was without a silk gown for special occasions such as holidays. For winter wear such gowns were either padded with cotton or waste silk, or lined with furs, and in the case of officials and men of substance, these furs were often rich in character. Cotton clothing was and still is almost universally worn by the masses. In winter it is padded, the trousers either with cotton or sheeps' wool, and the gowns or coats lined with sheepskins or dogskins with the hairy side outwards, or padded with cotton or wool. Clothing made in this way is very effective against cold and is inexpensive. It is among the great middle class, merchants and professional men, students and the increasing number of English-speaking Chinese to whom we must look for an increased future demand for foreign-style clothing.

IMPORTS OF WOOLLEN TEXTILES

The total value of imports of woollen textiles of all kinds into China for the five years 1917 to 1921 inclusive was as follows in Haikwan taels, the value of the Haikwan tael being approximately 75 cents Canadian currency: 1917, 3,676,815; 1918, 3,547,775; 1919, 3,936,585; 1920, 5,191,261; and 1921, 7,656,054 Haikwan taels. It will thus be seen that in 1921 consumption of foreign woollen textiles in China had increased over 100 over that for 1917.

IMPORTS UNDER THE SEVERAL CLASSIFICATIONS

The following shows the importations under the several classifications of goods from 1917 to 1921:—

Woollen Blankets and Rugs.—Imports: 1917, Hk tls. 172,111; 1921, Hk. tls. 394,893.

Broad Cloth, Habit and Russian Cloth.—Imports: 1917, Hk. tls. 32,000; 1921, Hk. tls. 131,800.

Camlets and Bunting.—Imports: 1917, Hk. tls. 91,700; 1921, Hk. tls. 134,146.

Coatings and Suitings.—This is the chief class of woollen goods imported into China. Imports: 1917, Hk. tls. 1,580,418; 1921, Hk. tls. 3,251,000.

Flannels.—Imports: 1917, Hk. tls. 18,217; 1921, Hk. tls. 84,200.

Lastings.—Imports: 1917, Hk. tls. 166,056; 1921, Hk. tls. 196,946.

Long Ells.—Imports: 1917, Hk. tls. 143,456; 1921, Hk. tls. 183,178.

Woollen Goods Unclassed.—Imports: 1917, Hk. tls. 929,000; 1921, Hk. tls. 1,171,217.

Spanish Stripes.—Imports: 1917, Hk. tls. 41,880; 1921, Hk. tls. 24,764.

Woollen and Worsted Yarn and Cord.—Imports: 1917, Hk. tls. 1,596,318; 1921, Hk. tls. 2,083,950.

PRINCIPAL SOURCES OF ORIGIN OF IMPORTS

Great Britain is credited with by far the bulk of the importations of woollen goods into China, Bradford and other Yorkshire products predominating as they have done for many years. Japan furnishes a small proportion of the cheap fabrics, particularly cloth for soldiers' uniforms, but the quantity coming from other countries is almost negligible. Out of total imports in 1921 of woollen coatings and suitings valued at Hk. tls. 3,250,000, Great Britain is credited with Hk. tls. 2,500,000 or over 75 per cent, and the same proportion applies to practically every other line of woollen goods.

OPPORTUNITY FOR CANADIAN WOOLLENS

From the returns already quoted for 1921, it will be seen that nearly 50 per cent of the total imports of woollen goods into China in that year consisted of coatings and suitings. Very little of these have ever come from Canada, yet the Dominion is a large producer of woollen cloth for men's wear. There would seem to be no reason why Canadian manufacturers should not obtain a share of this business, providing proper methods are employed to introduce their goods. It is to be borne in mind that there are no factories for the making of men's clothing in China, nor are men's "ready-mades" offered for sale in the shops, everything being made up by native tailors. The prices of men's clothing are quite low when compared with those charged in Canada. Long lengths of one pattern, unless it be blue or black serges, are not in demand; short pieces sufficient for three or four suit-lengths are what are required.

CANADIAN SAMPLES TOO SMALL

Attention is directed to the wealth of samples of textiles sent out by merchants and manufacturers in Great Britain. A visitor to any of the offices of the representatives of British firms will find hundreds of samples of different kinds of cloth, each piece being sufficiently large to show the general effect of the pattern when the cloth is made up, while the samples received from Canada are usually too small for this purpose, and the range too limited to afford a proper selection.

CHINESE INSURANCE COMPANY ABSORBED BY THE SUN LIFE OF CANADA

Trade Commissioner J. W. Ross

Shanghai, March 12, 1923.—A financial transaction of considerable importance has recently taken place in Shanghai, under which the China Mutual Life Insurance Company has been absorbed by the Sun Life Assurance Company of Canada. The China Mutual has been for the past twenty years the leading life insurance organization in the Far East and was founded by a Canadian in 1899. The transaction, which places the Canadian company in the front rank of all institutions doing life insurance business in India and the Far East, is a tribute to Canadian enterprise and energy, and should go far to strengthen Canadian influence in this part of the world.

MARKET FOR MACARONI IN BELGIUM

Trade Commissioner A. S. Bleakney

Brussels, March 29, 1923.—Following on several inquiries received from Canadian manufacturers of macaroni as to the prospects of selling their product in Belgium, investigation has been made, and it is found that at present France is the principal source of supply. Macaroni is imported from France in packages of ½-kg. (1·1 pound) and ¼-kg., and the most popular mark is the "Trois Abeilles" manufactured in Paris and Marseilles. This macaroni is made from semolina and not from flour, and is light yellow in colour; it contains no eggs. (Samples are on file at the Department of Trade and Commerce, Ottawa.) However, a firm in Brabant is rapidly coming to the front with a home-produced macaroni which is very much appreciated by the Belgian public. This macaroni is also made from semolina and is almost white in colour; it has no egg content. Of late considerably less macaroni has been imported from Italy, as several Italian firms are manufacturing this article in Belgium and selling it as an Italian product.

French, Belgian, and Italian macaroni all sell well at the following retail prices:—

French—Cardboard boxes of ½ kg., frs. 1.80 (bulk in 10 kg. cases, frs. 3.25 per kg.); ¼ kg. 0.90.
Belgian.—Cardboard boxes of ¼ kg., fr. 0.85 (bulk in 10 kg. cases; frs. 2. per kg.)
Italian.—Cardboard boxes of ¼ kg. (manufactured in Belgium), fr. 0.90 (bulk in 10 kg. cases; fr. 3. per kg.)

The sale of American and Canadian macaroni is temporarily eclipsed by the high rate of exchange. During quite a long period after the Armistice a great deal of American macaroni was sold in Belgium, but in many instances the packing was defective and the goods arrived broken and in some cases mouldy. Macaroni exported overseas should be carefully packed in strong cases and stowed away from the boilers.

Fresh macaroni, called *nouilles,* is manufactured by a Belgian firm and finds a ready sale. These are long strips or ribbons of macaroni paste only partially dried; they are delivered to the stores and sold in this moist state. After a few days, if unsold, they become dry and crisp and the manufacturer takes them back again and sells them as dry, broken *nouilles.* These dry *nouilles,* however, do not sell as well as the fresh. *Nouilles* containing eggs also sell well, the egg content being three to 1 kg.

As has been explained, the sale of Canadian macaroni in Belgium at present is exceedingly difficult owing to the high rate of the dollar. Importers state

that the price should not exceed 2 frs. per kg. delivered Antwerp, or at to-day's rate of exchange, i.e., 17 frs. to the dollar, 8½ kg. of macaroni for $1.

The import duty on macaroni is at present 8 frs. per 100 kg, but a proposed new law revising the customs tariff is due to come before the Belgian Parliament shortly, and if this law is passed, as it probably will be, macaroni will pay 12 frs. per 100 kg. if prepared for retail sale, and 8 frs. per 100 kg. in bulk.

The latest market reports (March 23) give the Antwerp price of American macaroni at 225 frs. per 100 kg.; Italian macaroni, 225 frs. to 250 frs. per 100 kg.; macaroni mezzani, 200 frs. to 210 frs. per 100 kg., in cases of 10 kg.

The following are the imports for the year 1922:—

	Kilogrammes	Value in Belgian Francs
Germany	89,356	184,058
United States	450,509	816,950
France	1,371,719	3,098,114
Great Britain	5,582	9,676
Italy	214,380	377,984
Holland	39,161	86,781
Switzerland	10,288	23,054
Other countries	59,147	107,695
Total	2,240,142	4,704,312

During the month of January, 1923, American imports were 13,352 kg. of macaroni to the value of 23,682 frs., which was quoted on the Antwerp market at 225 frs. per 100 kg., and this, at the average rate of exchange for the month (13.72 frs. to the dollar) figures out at $16.40 per 100 kg.

THE GERMAN BOOT AND SHOE EXPORT TRADE

Boot and shoe exports from Germany have been constantly decreasing and at the present time are about 6 per cent of the total production, states the *Leather Trades Review* of London, in the issue of February 28. Adjacent countries, especially the Netherlands and Denmark, are making great efforts to limit German shoe imports. The Dutch shoe manufacturers are even demanding the prohibition of the import of German footwear. Of the total exports of German boots and shoes, 43 per cent has been going to the Netherlands and 19 per cent to Denmark. The Danish Government is severely cutting down the German imports, allowing only up to the quantity imported in 1920, and is considering an increase of the import duty by 7 per cent.

At the last meeting of the German Shoe Manufacturers' Syndicate the manufacturers admitted that certain firms had been exporting at undesirably low prices. A Dutch calculation shows the German boots to be far cheaper than the British. The Netherlands imported 3,017 tons of footwear in the first nine months of 1922, of which 2,433 came from Germany and 324 tons from England. The value of the German imports was 7,496,000 guilders and of the English 1,576,000, so that the average cost of a ton of German shoes was 3,199 guilders and of English, 4,879.

The German Government has reduced the export duty on shoes from 5 per cent to 4, but manufacturers are demanding the abolition of the tax, claiming that otherwise the industry can not compete with foreign production.

RUBBER GOODS MARKET IN FRANCE

Trade Commissioner Hercule Barre

Paris, March 8, 1923.—In France there are many large and well-organized factories manufacturing rubber goods, the most important of which are those associated with the automobile tire industry. One American and one English concern own factories near Paris. The most important French tire manufacturer is the Michelin Company, who turn out 10,000 tires per day, two-thirds of which are for the export market, mainly England, India and South America. Before the war the exports of tires were far in excess of the imports, but exports of belting and piping almost balanced imports, the latter being shipped from England. In 1914 the Continental Tire Company had the largest part of the business, but as it was a German company with a branch factory in France, it was sequestrated on the outbreak of war and its trade has now been taken over by French factories and by imports from foreign countries other than Germany.

	1913	
	Imports. Metric Tons.	Exports. Metric Tons.
Tires	1,310	4,244
Belting and piping	1,314	1,334

The present situation can be judged from the import and export figures given below:—

IMPORTS OF RUBBER, RAW AND MANUFACTURED, DURING 1922, FROM GREAT BRITAIN, UNITED STATES, AND CANADA

	Great Britain 1922 Metric Quint.	United States 1922 Metric Quint.	Canada 1922 Metric Quint.
Raw rubber	128,491	4,737	24
Rubber sheets, pure, not vulcanized	421	7	..
Rubber threads, vulcanized	1,403	1,131	..
Elastic materials	245	4	..
Waterproofed materials	145	18	2
Suspenders, garters, supporters, belts	9	46	..
Other clothing and readymade articles	69	97	..
Rubberized cloth for carding purposes	324	..	..
Rubber footwear	1,250	47	271
Valves, inner tubes, tires, belting for automobiles and cycle wheels	6,086	3,413	1,269
Belting, piping, valves, etc., in rubber, separate or not	7,273	1,393	3

TIRES

The tire trade is in a state of great uncertainty at present owing to the struggle between the Dunlop and Michelin companies. As France is the home of the latter company, it was inevitable that this fight should extend to France, where they have about 80 per cent of the tire business and rule the prices. The English rubber combine have attempted to raise the price of raw rubber as part of their campaign against the Michelin Company, and it is difficult to say at present what the result will be. Prices have already been raised 15 to 20 per cent recently by the Rubber Association, and as another rise is expected shortly, the trade is in a state of uncertainty, and conditions do not look very favourable at the moment for the introduction of new lines of goods.

The only American firm manufacturing in France is the Goodrich Company, which has at Colombes, just outside Paris, one of the largest factories in the world.

Customs Duty.—The duty on the tires imported from the United States and England is 225 frs. per 100 kg., whereas the duty on Canadian goods is at

present 150 frs. per 100 kg. It is anticipated, however, that with the application of the new convention rates Canadian goods will pay the same duty as the United States.

Selling Methods.—Dealers here speak well of Canadian houses with whom they have dealt, and state that these firms are willing to give better terms and do more to further export trade than manufacturers of some other countries. The most usual way of selling is to let the dealers and garages throughout the country have small stocks on consignment subject to a discount, payments being generally half on delivery and balance thirty or sixty days after the goods are sold. In addition to the discount, dealers are also often granted a rebate at the end of the year. Most American and Canadian firms have an agent or a branch office in Paris. To allow the dealers to keep a stock, some manufacturers grant six to nine months' credit for a first order, but only on about 10 per cent of the dealers' annual sales. Other firms have a method by which the dealer places a guarantee in a bank, a sum which is gradually reduced as payments are made, but if the customer is favourably known the guarantee is not often asked for. Conditions and customs vary a good deal according to the part of the country, the importance of the order, etc. For these reasons, and to save middleman's profits, a branch office in France is strongly recommended. In general very little advertising is done except by posters or signs in garages and agents' shops.

Kinds of Tires.—The beaded edge tire is by far the most popular, as practically all French cars are fitted with them, and straight-sided tires are mostly used for replacements on American-made cars, a large number of which are in use here. The Michelin Company has contracts with the majority of car builders to supply the original tires on all new cars, and has built up its business on small profits and high quality. There is a large variety of sizes in use, and are given below in order of popularity. Tires are only quoted here in millimetre sizes: (1) 815 to 105, (2) 820 by 120, (3) 880 by 120, (4) 710 by 90, (5) 760 by 90, (6) 820 by 135, (7) 880 by 135, (8) 815 by 120, (9) 935 by 135.

The production of iron-studded non-skid tires is quite insufficient for the demand, and at least two-thirds of these are imported from the United States, Canada, and Italy, Canada being favoured owing to the preferential tariff. There is also a certain opportunity on the market for non-skid tires for trucks. The production of ordinary rubber tires is more important and more nearly approaches the demand. There is at present a great vogue for motor cycles and light cycle-cars and a good deal of business is to be done in tires for these vehicles. These classes of motors are being manufactured intensively, and as many foreign tire makers are working to get a share of this trade, there is certainly a place for Canadian products. As regards inner tubes, there is not very much demand for the imported product, as the French supply is of excellent quality and can keep pace with demand. Enormous stocks of solid truck tires, left over after the war, are on the market.

MISCELLANEOUS RUBBER GOODS

Vulcanite Articles.—Insulators are imported chiefly from the United States, few being made in France. A limited number are also shipped from Great Britain; the British fittings are said to be better finished than the American. There is an opportunity for the Canadian product, but care should be taken first to ascertain the kind wanted in order that measurements of fittings may be such as can be used with French apparatus. Telephone receivers and fountain pens are almost entirely imported from the United States or Great Britain. There is little opportunity for the sale of ebonite in sticks.

Vulcanizers.—Although not rubber goods, these are a side line in the trade and find a good market in France. A few American firms have entered the market.

Toys.—There is a large demand for rubber toys in Paris, but most of the goods sold are of local manufacture. A place might be found for Canadian importations of rubber balloons.

Garters and Suspenders.—Men's garters are almost wholly imported from the United States, and Canadian firms should likewise be able to do business. In suspenders, the French factories absorb practically the whole of the trade.

Soles and Heels.—These articles are mostly shipped from the United States or England; but in spite of an intensive advertising campaign by several firms, they are very little used. Lately rubber plates have been in use by some of the working classes, but the market is not important enough for profitable exploitation.

Erasers, Sponges.—Erasers are imported from the United States, Czecho-Slovakia and Austria. The manufacture of these goods in France is not important. Rubber sponges have been used a great deal, but are said to be decreasing.

Medical Catheters.—France is the leading country in the manufacture of these articles, and the makers here have attained wonderful precision. About three-fourths of the local production is exported, principally to the United States and Canada.

Bulbs and Gloves.—English manufacturers have been able to produce a quality of rubber for these articles which is strong and at the same time resilient. Some of these goods are manufactured in France, but the shipments from England are very important. Most of the supplies of surgical gloves are, however, made within the country.

Rubbers for Feeding Bottles.—These articles are practically all made in France, the bone rings being made in the Jura country and the rubber parts in Paris. The law of February 27, 1917, lays down the chemical conditions for the manufacture of these goods and aims at the eradication of all products suspected as being impure.

Boots.—Rubber boots are used exclusively in the country districts; they are made by several French firms and are also imported from the United States and England. French factories can only supply about 25 per cent of the demand. Special boots are worn by sewer cleaners, and these are mostly imported from England.

Waterproofs.—Before the war the greater part of the waterproof coats were imported from England, but the better quality were made locally. In the French garment the collar and sleeves were cut more carefully than the English, in which appearance was sacrificed to utility. Since the fall in the value of the franc, local manufactures have increased and now supply most of the demand as the price of English goods is prohibitive. French manufacturers have developed an export market for high-quality waterproofs, well finished and cut, in Belgium, Holland, and the Scandinavian countries.

Raw Rubber.—France uses annually from 10,000 to 16,000 metric tons of raw rubber, the largest part of which is imported from Great Britain, though much is also shipped from the French colonies and from Brazil. The exports of raw rubber amount in general to about 66 per cent of the total imports; the latter have considerably increased since the war. The price of raw rubber is generally quoted in English currency.

Manufactures.—France is the fifth largest consumer of rubber in the world, the United States, the British Empire, Germany and Japan leading. There are in France about 100 manufacturers employing about 60,000 workers and the capitalization is more than 1,000,000,000 francs. In spite of the favourable appearance of these figures, the industry is far from flourishing and has been very much affected by the business crisis through which all countries are passing. The motor car and tire industries are just beginning to recover from their depression. Rubber manufacturers have had to abandon the Canadian market, as they are unable to deliver in Canada at competitive prices. One of the great causes of the depression has been the scarcity of benzol, of which 1,400 metric tons were formerly produced in France, but owing to the slowing up of the metal industry, the quantity now produced is insufficient for the national requirements. For these various causes, much less rubber has been produced than in former years, and if it had not been for the rise in prices many firms would probably have had to go out of business.

CONCLUSION

Before attempting to do any business in France, a thorough study should be undertaken of the market with reference to the particular articles to be sold; and it is recommended that firms intending to enter the market should, if possible, have a branch office or, failing that, an agent in France.

MODERN DAIRY EQUIPMENT IN SWITZERLAND

The dairy industry in Switzerland is becoming more modernized and in consequence there are new possibilities for the sale of barn and dairy equipment to fill the demand caused by the changes that will necessarily follow this movement, says the United States *Commerce Reports*. The quaint old-fashioned barns are being replaced by modern structures, and better facilities are provided for sheltering the cattle.

Where the pasture lands upon the mountain sides are accessible, the cattle spend most of the summer and fall grazing in these pastures, and most of these herds furnish the milk necessary for the production of cheese. In the lowlands, however, and in the neighbourhood of the cities, more modern methods prevail, and it is here that there exists the greatest opportunity for the sale of modern equipment. The large cities require an abundance of milk, and upon the dairies supplying the milk falls the heaviest burden. Labour costs are high and the cost of milk, which is delivered at the house into a receptacle owned by the customer, is considered high.

Therefore, labour-saving devices are needed, which not only increase efficiency, but also reduce costs. Modern barn equipment, such as feed and manure conveyors, are not known, but it is believed that they could be successfully introduced because of the need for producing milk that will sell at a lower price. Stanchions in connection with steel stalls would not sell readily because of the antipathy felt by the farmers toward this way of stalling cattle, but a demand might be created by means of educational propaganda.

CONSUL FOR THE REPUBLIC OF NICARAGUA AT MONTREAL

Mr. Paul Viau has been appointed the Consul for the Republic of Nicaragua at Montreal. His address is 137 McGill street, Montreal.

THE MARKET FOR TEXTILES IN ARGENTINA

Assistant Trade Commissioner P. W. Cook

[*This is the concluding report in a series of three by Mr. Cook on the Market for Woollen and Silk Textiles in Argentina, the earlier parts of which were published in the last two issues of the "Commercial Intelligence Journal."*]

General Selling Conditions in the Import Market

SOME ASPECTS OF THE ARGENTINE TARIFFS

The Argentine tariff is non-preferential in character, but there are certain points in connection not only with the duties leviable but more particularly with the tariff regulations and methods of clearing merchandise by Argentine Customs authorities which should be appreciated before shipments are undertaken.

Briefly the Argentine tariff is ad valorem, but is based on the principle of a fixed and arbitrary Government valuation of commodities upon which a fixed rate of duty is charged. The prices of 1906 were established as a basis. In June, 1920, there was an all round increase of 20 per cent in official values. (See *Weekly Bulletin* No. 867, September 13, 1920.) In 1918 and 1920 duties were increased to a certain extent by surtaxes, but the fact remains that in effect the great increase in commodity prices since 1906 has resulted in the present tariff being to-day very much lower, ad valorem, than when it was introduced. A proposed increase is noted in *Commercial Intelligence Journal* No. 992 (February 3, 1923, page 491). As it now stands, the tariff is not high enough, with one or two notable exceptions, to afford very great protection to native textile industries. The table given hereunder may serve as a broad outline of the general classification of silk and woollen textiles.

Character of Goods	Classification
Up to 40 per cent silk; remainder cotton	Cotton fabric containing silk.
Between 40 and 85 per cent silk; remainder cotton	Silk fabrics mixed.
Between 85 and 100 per cent silk	Silk fabrics.
Up to 40 per cent wool; remainder cotton	Cotton fabric containing wool.
Between 40 and 85 per cent wool; remainder cotton	Wool fabrics mixed.
Between 85 and 100 per cent wool	Wool fabrics.
Up to 15 per cent wool; remainder silk	Silk fabrics.
Between 15 and 40 per cent wool; remainder silk	Mixed silk fabrics.
With more than 40 per cent wool; remainder silk	Mixed silk fabrics.

The following paragraphs taken from section 17 of the Argentine tariff are worth particular notice, as they explain in detail much of the foreging:—

"For appraisement purposes, *silk tissue* shall cover any tissue containing not more than 15 per cent of other fibres; *tissue of mixed silk* shall cover any tissue containing 40 per cent and upwards, but less than 85 per cent of silk; *tissue with silk* shall cover any tissue containing less than 40 per cent of silk. Any *tissue* containing more than 40 per cent of wool shall be dutiable at the rate of 30 per cent £.

"*Tissue of wool* shall cover any tissue containing up to 15 per cent of other fibres except silk; *tissue of mixed wool* shall cover any tissue containing 40 per cent and upwards, but less than 85 per cent of wool in its mixtures with other fibres, except silk; *tissue with wool* shall cover any tissue containing less than 40 per cent of wool in its mixtures with other fibres, except silk."

As silk is dutiable at very much higher rates than woollens, the foregoing should be carefully noted in connection with the export of mixtures. Additional charges to which goods are subjected by the Customs authorities, and which in total are unimportant, are for warehousing, handling, use of crane, etc. Artificial silk is subject to the same duties as genuine silk.

DUTIES AND CLEARANCE AFFECTED BY PACKING

The most important point to remember is that the packing of goods materially affects the amount of duty chargeable, and if not correctly done may result in a loss to the importer, who has to meet the resultant fines and additional charges. The following is a brief summary of the chief points in this connection, and it is strongly recommended to Canadian manufacturers that they be followed with meticulous care as the Customs authorities are very strict in enforcing all regulations.

It may be assumed as a general rule that bales, sacks, rolls or bundles are assessed on gross weight; case goods in general on net weights, which may be taken to be that of the goods *plus their immediate container.* Silks are weighed with paper wrapping only. The tariff on all merchandise dutiable on weight basis is increased by surcharges of 10 per cent if it arrives in boxes or cases loose; that is to say, boxed without wrappers or immediate containers. This ruling has been made from the practice of certain importers of having goods packed in bulk in cases, thereby being able to declare a lower weight and consequently a lower valuation. It is therefore of importance that textiles packed in cases should have a wrapper of some kind.

It is a common, troublesome, and expensive mistake to include in the statement of the net weight of a case articles of different classes and subject to different rates of duty. A statement of the net weight in total is insufficient; the net weight of textiles of *each class* contained in the case must be declared. If for any reason merchandise is packed loose, the packing list should state "without immediate containers." If this declaration is not made the 10 per cent surcharge is levied, and in addition a *fine of equal amount for failing to make a correct declaration.* Ignorance of these regulations is never accepted as an excuse. In respect of all textiles legal weight—that is to say the weight upon which duties are leviable—includes not only the immediate containers or wrappings but the board, spool or other article on which the textile is wound or rolled.

The following form, the result of experience, meets the requirements of the Argentine Customs authorities:—

Marks	Nos.	Weights			Merchandise and if possible Compositions	Cub. Meas.	Observations
		Gross	Legal	Net			

All stencilled instructions on cases should be in Spanish and English, and all weights in kilos.

The conditions of the parcel post surtax of 25 per cent given in last week's issue should be taken into account in respect of mail consignments to agents or representatives.

MARKING OF GOODS AND SAMPLES.

All textile shipments of piece goods should be accompanied by the declaration as follows:—

(1) Number and name of line.
(2) Prices Canadian gold per yard or unit, f.o.b. port of shipment and c.i.f. Buenos Aires.
(3) Shades or colours.

(4) Composition, stating percentage of each material; example, 85 per cent. wool—15 per cent. silk.
(5) Weight in grammes per lineal metre. Weight in grammes per square metre. Width in centimetres (it is also desirable to duplicate these in ounces, inches and yards.)
(6) Gross weight per case in kilos. Net or legal weight per case in kilos. Tare weight per case in kilos.
(7) Volume of case in cubic metres. Number of pieces to the case. Yards or metres per piece, and yards or metres in total.
(8) Purpose for which goods are intended, i.e., dresses, skirtings, shirtings, etc.

It is particularly important that samples should be identified by a statement including (1) to (4); in shipments of wearing apparel, such as hosiery, gloves or underwear, all the foregoing points that are applicable should be included, changing "yards" to "pairs" or "dozens," and the reference to cases to parcels as the case may be. In addition, a memorandum should accompany first consignments of samples containing instructions or agreements regarding price changes, terms desired, special packing arrangements, deliveries, commissions, discounts and a list of code words for cable correspondence. These and all other documents must arrive prior to consignments either of goods or samples.

Item (4) is of great importance, as it affects the duties chargeable, as has been outlined in a previous section. As an example, the instance may be cited where a Canadian woollen manufacturer forwarded to Argentina samples of a novelty line without stating that it contained silk. At the price quoted this particular line promised to sell exceedingly well until it was discovered that the percentage of silk was such that it was dutiable at the highest rate of $4 gold per kilo, which made the retail price prohibitive. Samples should be sent by parcel post with as light an immediate container as possible, and should be marked "Muestras sin Valor." This does not preclude the payment of duty and other charges, but to a certain extent assists in clearing. If samples are mutilated either by the manufacturer or by the Customs authorities they do not pay duty, but to send half pairs of stockings or such articles does not serve this purpose. Small clippings of piece goods, obviously of no commercial value, are of course not dutiable.

CREDIT TERMS AND DISCOUNTS.

It will rarely be found that the Argentine buyer will make payments against established letters of credit. The best that can be expected is cash against documents Buenos Aires. But even this arrangement is uncommon. It will generally be found desirable or necessary to quote 60, 90 or even 120 days sight. This principle has been established for many years by British and other European exporters; and it is one that Argentine importers are now inclined to stand by. The system of trade discounts should be avoided, and net prices, preferably at 90 days sight, free of interest, quoted under all circumstances. Open accounts can be safely undertaken with many Argentine houses, and any offer to do business on these terms will invariably secure preferential consideration. Quotations should be made in Canadian currency, except when sales are made from stock-carrying branches established in the country.

Much has been said in Canada about the unreliability of Argentine firms, and the opinion seems to be widely held that credits in Argentine are somewhat unsafe. During the period of acute depression and very adverse exchange there was undoubtedly some justification for complaint against certain firms. But

the fact remains that the majority of established Argentine importers are to-day safely afforded long credit terms exactly as before the war. And in any event, no Canadian manufacturer need undertake business without first obtaining the full reports which are on file at the Royal Bank of Canada, Montreal, or at the mercantile agencies.

THE VALUE OF ESTABLISHING A LINE.

The ultimate value of establishing a line is certainly not less in Argentina than elsewhere. Certain broad classifications, such as Scottish tweeds or Manchester calicos, have been so long established that they are regarded here as elsewhere as the standard; the object of Canadian manufacturers should be to develop a definite recognition of the trade name or trade mark of their particular or specialty lines. The example may be cited of a light British textile known as "Fresco." This has been so well advertised that nowadays one does not ask for the type of cloth, but for the name "Fresco." It has become the standard of its particular type. There are several good advertising firms in Buenos Aires through the agency of which manufacturers, in co-operation with their resident representatives, can obtain excellent and systematic publicity.

It should be noted that priority of registration of trade marks or trade names counts in Argentine law over priority of ownership, and that therefore piracy in this respect is of common occurrence.

SELLING METHODS AND REPRESENTATION.

It is perhaps more difficult in Argentina to secure efficient representation for textiles than for any other kind of merchandise. This because the market is exceedingly competitive, and because there are many old-established British and other firms watching every fluctuation of price and demand. Selling may be effected by any one of the following three methods:—

(1) The annual or semi-annual canvass of the territory by the factory representative. This is the plan adopted by many British houses. There are known to this office several such travellers for Bradford and Manchester houses, who visit South America every July or August and book orders direct with jobbers and retailers, not only in Argentina, but who on the same journey canvass Brazil, Uruguay and Chile. This method entails considerable expenditure, and is hardly likely to achieve maximum results until, after a number of years, the line becomes known, the name recognized, and the demand established. In the first instance it might be effectively undertaken by a group of associated manufacturers. Should this procedure be adopted by any Canadian firms, it is as well to note that the best time to cover the Argentine market is during the winter, i.e., June to October. A knowledge of Spanish is desirable, but not essential.

(2) The employment of a resident local agent. This is a usual and sometimes effective procedure, but it is hard to find really efficient agents who are not already representing as many lines as they can conveniently handle. There are any number of representatives of doubtful value who would be glad to accept an agency, but those in a position to devote the time, energy and ability which effective selling demands are few and far between. The *modus operandi* of such agents is not to purchase on their own account, but to book orders, cable them to the factory, and arrange payments direct from the purchaser, drawing their commissions from the factory at stated periods. The great advantage of this method is that it is inexpensive, and with adequate sources of commercial information does not entail any serious risk of loss.

(3) The third method is to place the agency in the hands of an established importing wholesale house which already has its own clientele and which is in a

position to carry stock. There are many of these in Buenos Aires, but so far as is known none have so far been seriously approached by Canadian textile interests.

One other method of sale should be considered by those manufacturers who are content to begin in a limited way, or who are not prepared to enter upon a possibly long and difficult process of independently establishing their line in this market. This is direct selling to the New York purchasing agents of the great Argentine departmental stores, all of which maintain purchasing agents, either permanently or for certain periods of the year, in London, Paris, Manchester, Barcelona, and New York. Their annual importation is very large, and it is not unlikely that if the representatives of Canadian factories would consult with their buyers business might ensue. The names and addresses of these purchasing agents are on file at the Department of Trade and Commerce, Ottawa.

The method of selling through an export house is rarely successful in Argentina. Prices are too close and competition too keen. It is well nigh impossible to persuade any serious importer to deal with an export house; this office has attempted to do so on several occasions, but without success. It is rarely that sales of any consequence can be effected except directly from the factory to the importer or consumer. This does not perhaps apply to non-competitive lines, but in textiles it is the rule.

Once connections are established, every effort should be made to follow exactly the instructions or advice of the resident representative regarding packing, documentation and delivery. However different from Canadian practice these appear, it may be taken for granted that there exists an excellent reason for each. All else being equal, the manufacturer who most nearly adjusts his sales methods to the requirements of the importer will be most successful ultimately.

CUBAN MARKET FOR CERTAIN CANADIAN PRODUCTS

J. L. Gonzalez-Hoyuela, Office of the Canadian Trade Commissioner

Havana, March 31, 1923.—*Codfish.*—There is a large local stock of this commodity, which is estimated at from 12,000 to 14,000 cases. The latest arrivals of codfish were 3,800 cases from Halifax and some 3,500 cases by a Norwegian steamer. Canadian cod is being sold at $8.25 and $8.50 per case, duty paid and delivered; and Norwegian cod at from $10.50 to $11.50 per case, also duty paid and delivered. Although there has been the natural increase in consumption during the Lenten season just closed, the market remains rather weak. Another steamer from Norway is expected here shortly, bringing some 3,000 cases of Norwegian codfish.

Wheat Flour.—There are some arrivals of Canadian wheat flour. Quotations on American flours are a little below Canadian quotations. Canadian first patent is quoted at $8.75, as compared with $8.50 for the same quality of American flour. The local flour market is very weak, large quantities of cheap American flours have been received, and it is well stocked on this account.

Potatoes.—The market is firmer during this week, and sales are being made at $4 per sack of 180 pounds, duty paid. Considerable quantities of European potatoes are being sent to this market and sold at very low prices, sales being made at $1 per 100 pounds c.i.f. They are shipped from Holland, Belgium and England.

TARIFF CHANGES AND CUSTOMS REGULATIONS

Position of British Dominions Under Spanish Tariff

Following is the translation of a notice from the office of the Under-Secretary, Ministry of State, Spain, which appeared in *La Gazeta de Madrid* of March 9, 1923:—

"In accordance with the notifications made by His Majesty's Government to that of Great Britain, the products of India and of the British Dominions and Colonies, as also those of the Free State of Ireland, shall pay on their importation into Spain the duties of the second column of the Customs Tariff, in consideration of the fact that the said countries concede most favoured nation treatment to Spanish products.

" This arrangement (granted in respect of the countries in question because the Hispano-British Treaty of Commerce and Navigation of the 31st October, 1922, under the terms of article 24 thereof does not of course apply to them) shall be operative in the first place for a period of six months, and thereafter shall continue to apply until six months after the arrangement shall have been denounced."

The second column of the Spanish customs tariff consists of duties lower than those of the first column. There are other rates of duty in the Spanish tariff established by convention which are still lower than those of the second column.

Australian Deferred Duties Further Postponed

Mr. M. B. Synan, official representative in New York of the Australian Department of Trade and Customs, has forwarded copy of an advice received from Australia to the effect that the operation of the following deferred duties has been further postponed as indicated:—

Item 136 F	Hoop iron and steel to September 30, 1923.
Item 147	Iron and steel plates and sheets, plain tinned to September 30, 1923.
Item 152 A	Iron and steel tubes, etc, to September 30, 1923.
Item 168 B (1)	Sewing machine heads to September 30, 1923.
Item 194 D	Chains, n.e.i., to September 30, 1923.
Item 197 B	Cutlery, n.e.i, to September, 1923.
Item 279 A	Citric acid, to September 30, 1923.
Item 181 B (2)	Cables, etc., to July 1, 1923.
Item 424 B	Vessels, n.e.i., to January 1, 1924.

(See *Commercial Intelligence Journal* No. 992, February 3, 1923, page 189.)

Compo Board Dutiable in New Zealand

A notice was published in the *New Zealand Gazette* of February 15, 1923, to the effect that " Compo board," consisting of timber with a layer of paper-pulp, strawboard, paper, or similar material cemented thereto on one or both sides, and being an article which is not specifically enumerated in the tariff, and which is, in the opinion of the Minister of Customs, a substitute for dressed sawn timber, shall be charged with duty at the rate of four shillings per hundred superficial feet, and shall, in addition, be liable to primage duty of one per centum ad valorem.

Customs Duty on Condensed Milk in British Guiana

Trade Commissioner E. H. S. Flood

In *Commercial Intelligence Journal* No. 992 (February 3, 1923, pp. 189, 190) it was reported that certain changes affecting condensed milk had been made under the New Guiana Customs Tariff Ordinance No. 31 of 1922. It was there provided that rates of duty should be as follows:—

	Rate of Duty	
	Pref.	Gen.
35. MILK, condensed—		
(a) Containing not less than 10 per cent butter fat, per 48 pounds	Free	$0 48
(b) Containing less than 10 per cent of butter fat, per 48 pounds..	$4 80	9 60

The following has now been substituted:—

35. MILK, condensed, including milk powder:—		
(a) Which, in the opinion of the Comptroller of Customs, has been prepared from whole milk, 48 pounds..	Free	$0 48
(b) Which, in the opinion of the Comptroller of Customs, has been prepared wholly or in part from skimmed milk, per 48 pounds..	$4 80	$9 60

In the discussion which took place in the Combined Court, it was decided that the expression in the Ordinance, "in the opinion of the Comptroller of Customs," is to mean "the Comptroller of Customs as advised by the Government Analyst."

It was declared by the Director of Science and Agriculture, who was present when the Bill was passed, that the analysis of condensed milk, to ascertain the exact proportion of the content of butter fat, was a complicated process, and would cause undue delay to business, and that the only thing that mattered was whether the milk imported had been made from whole milk or skimmed milk, and this is the principle on which the new Ordinance is based.

Customs Procedure Arising Out of Irish Free State Tariff

Mr. Harrison Watson, Trade Commissioner in London, England, has forwarded particulars as to various customs formalities arising out of the separation of the Irish Free State from the United Kingdom for customs purposes. Dutiable goods imported into Great Britain or Northern Ireland may be deposited in bonded warehouses and re-exported from bond without paying duty. Further, in all cases where the law provides for payment of a drawback on exportation, goods which have been duty-paid on their importation from overseas may be exported to the Free State on drawback. Goods imported from overseas may also be entered for passage through Great Britain and/or Northern Ireland to the Free State under bond.

Regarding procedure to be adopted in the Irish Free State Customs Service in dealing with dutiable goods imported and then re-exported to Great Britain, the following courses are open: (1) The goods may be dealt with under the Transit Regulations, which involve no payment of duty. (2) The goods may be deposited in approved warehouses in the Irish Free State and exported therefrom to Great Britain without payment of duty. (3) If the goods are eligible for drawback a drawback corresponding to the duty may be paid on exportation.

Newfoundland Reduces Duties on Sugar

Information has been received from the office of His Majesty's Trade Commissioner in Canada and Newfoundland (285 Beaver Hall Hill, Montreal) that the duties on sugar entering Newfoundland have been reduced, the rates to be enforced in future being as follows: Sugars—loaf, cut loaf, cube, castor

and icing or fine ground, per pound, 3 cents (formerly 5½ cents); all other kinds of sugar, granulated or otherwise, white, brown or yellow, per pound, 1½ cents (formerly 4 cents). The surtax of 10 per cent and the sales tax of 5 per cent are, of course, still in force.

United States Duty on Automobile Wheels

Mr. M. M. Mahoney, representative at Washington, of the Department of External Affairs of Canada, writes that on April 6 the United States Treasury Department circularized their Collectors of Customs that the department had been officially informed that Canada classified automobile wheels complete with nuts, bolts, rims, and cups under tariff item 438 at the rate of 35 per cent ad valorem when imported from the United States. This rate is published for the information of United States Collectors of Customs in connection with the "equal" duty provided for on automobile parts in paragraph 369 of the United States tariff. The rate otherwise laid down in the United States tariff is 25 per cent ad valorem.

INAUGURATION OF THE SCANDINAVIAN-AMERICAN LINE SERVICE BETWEEN MONTREAL AND COPENHAGEN

Messrs. McLean Kennedy, Limited, Coristine Building, Montreal, who are the agents for the Scandinavian-American line, announce the first sailing of the service between Montreal and Copenhagen, by the ss. *Pennsylvania* from Montreal about May 20, to be followed by the ss. *Arkansas* about June 20

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain.	†*Aquitania*	New York	May 1
" " "	*Montcalm*	Montreal	" 4
" " "	-*Canada*	"	" 5
" " "	†*Homeric*	New York	" 5
" " "	†*Mauretania*	"	" 8
" " "	:*Minnedosa*	Montreal	" 9
" " "	†*Minnekahda*	New York	" 10
" " "	*Montrose*	Montreal	" 11
" " "	:*Empress of Scotland*	Quebec	" 12
" " "	*Regina*	"	" 12
Ireland only	‡*Metagama*	"	" 3
"	‡*Marvale*	"	" 10
France	**Ausonia*	"	" 5
Union of South Africa	**Barracco*	"	" 5
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela	*Caraquet*	Halifax	April 27
Bermuda, Bahamas, Jamaica, Colombia, British Honduras	**Can. Forester*	Montreal	May 3
Barbados, Trinidad, British Guiana	**Can. Runner*	Halifax	April 21
Cuba, Jamaica, and Colombia	**Andalusia*	"	" 26
Argentine Republic	**Hesperia*	Montreal	May 20
China and Japan	*President Madison*	Victoria	April 20
" " "	*Empress of Canada*	Vancouver	May 3
Australia only	‡*Sonoma*	San Francisco	April 24
Australia and New Zealand	*Makura*	Vancouver	" 27

† Letter mail only. * Parcel post and specially addressed correspondence only.

‡ Letter and Paper mail only. - Papers parcel post and specially addressed correspondence only.

: The *Minnedosa* and *Empress of Scotland* will also be used for direct mail for the Continent including direct Parcel Post to France.

Mongolia, announced in last issue as sailing from New York, is cancelled.

TENDERS INVITED

Australia

Copies of tender forms and specifications have been received from Trade Commissioner D. H. Ross, Melbourne, for material required by the Victorian Government Railway Department, Melbourne, and the Commonwealth Postmaster General's Department at Melbourne and Sydney.

These tender forms and specifications are open to the inspection of interested Canadian manufacturers at the Department of Trade and Commerce, Ottawa (refer to file No. 26502).

Tenders in conformity to the specifications should be addressed, respectively, to the Secretary, Victorian Government Railway Department, Melbourne, Australia; the Deputy Postmaster General, Melbourne, Australia; and the Deputy Postmaster General, Sydney, Australia.

Particulars of the requirements are briefly outlined thus:—

VICTORIAN GOVERNMENT RAILWAYS

Victorian Government Railways

No.	Date of Closing.	Particulars.
35,900	June 20, 1923	Supply and delivery of geared upsetting forging Machine; (2) slow speed bulldozer; (3) hot sawing and burning machine, including all necessary tools and accessories with each machine; and (4) dies and tools, as specified.

POSTMASTER GENERAL'S DEPARTMENT

No.	Date of Closing.	Particulars.
V. 119	June 12, 1923 (Melbourne)	Supply and delivery of two motor generators and associated accessories, and 3,380 feet of lead covered power cable as specified.
N.S.W. 3	June 21, 1923 (Sydney)	Supply and delivery of 37,370 yards of silk and cotton and lead covered switchboard and multiple twin underground cable, as specified.
N.S.W. 8	June 21, 1923 (Sydney)	Supply and delivery of 132½ miles of telephone switchboard wire, as specified.

New Zealand

Auckland, March 19, 1923.—Copies of specifications have been received from Mr. W. A. Beddoe, Canadian Trade Commissioner, Auckland, for equipment for the Post and Telegraph Department, Wellington. These specifications are open for inspection at the Commercial Intelligence Branch, Trade and Commerce Department, Ottawa. Tenders should be addressed to the Stores Manager, Post and Telegraph Department, Wellington, in accordance with these specifications.

No.	Date of Closing.	Particulars.
C.S. 178/346	June 5, 1923	1,000 dozen pencils, H.B. black, superior, to be stamped "N. Z. P. & T. Dept."
C.S. 178/358	May 22, 1923	2,000 reams paper, absorbent, 13-inch. x 8½-inch.; 50 reams paper, linen-backed, 13-inch. x 8½-inch.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING APRIL 17, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement of the nominal closing quotations for all the principal exchanges for the week ending April 17, 1923. Those for the week ending April 10 are also given for the sake of comparison.

			Parity	Week ending April 10, 1923	Week ending April 17, 1923
Britain	£	1.00	$4.86	$4.7493	$4.7455
France	Fr.	1.	.193	.0673	.0670
Italy	Lire	1.	.193	.0506	.0500
Holland	Florin	1.	.402	.3993	.3993
Belgium	Fr.	1.	.193	.0582	.0578
Spain	Pes.	1.	.193	.1562	.1568
Portugal	Esc.	1.	1.08	.0494	.0484
Switzerland	Fr.	1.	.193	.1863	.1847
Germany	Mk.	1.	.238	.000047	.000045
Greece	Dr.	1.	.193	.0122	.0122
Norway	Kr.	1.	.268	.1828	.1823
Sweden	Kr.	1.	.268	.2709	.2713
Denmark	Kr.	1.	.268	.1931	.1922
Japan	Yen	1.	.498	.4959	.4957
India	R.	1.	2s.	.3213	.3213
United States	$	1.	$1.00	1.0200	1.0200
Mexico	$	1.	.498	.4959	.4957
Argentina	Pes.	1.	.424	.3735	.3738
Brazil	Mil.	1.	.324	.1083	.1122
Roumania	Lei	1.	.198	....	....
Jamaica	£	1.	4.86	4.7646	4.7570
British Guiana	$	1.	1.		
Barbados	$	1.	1.		
Trinidad	$	1.	1.		
Dominica	$	1.	1.		
Grenada	$	1.	1.	.9843—.9913	.9855—.9951
St. Kitts	$	1.	1.		
St. Lucia	$	1.	1.		
St. Vincent	$	1.	1.		
Tobago	$	1.	1.		
Shanghai, China	Tael	1.	.708	.7586	.7624
Batavia, Java	Guilder	1.	.402	.3927	.3927
Singapore, Straits Settlements	$	1.	.567	.5661	.5661

CHEESE SHORTAGE IN GREAT BRITAIN

For many weeks, says the London correspondent of the *Manchester Guardian Commercial*, the market for cheese in England has been on the rise, for there has been a very small "make" in Canada, and we have been dependent almost entirely on New Zealand. Hence the fact that the lowest retail price for cheese is 1s. 6d. per pound.

The market has been almost bare of English cheese for months past, and such "factory" lots as have been available have been quoted at 144s. per cwt. It is many years since the shortage of Canadian cheese was so pronounced as it is now, and although importers will quote a price if pressed, delivery is by no means certain. An official statement indicates that, in spite of the shortage of Canadian cheese, good supplies would be coming in from other sources, and there was no reason to anticipate further increases in price.

Importers, however, point to the fact that home stocks are practically exhausted, and that colonial shippers other than Canadian cannot make up our stocks and meet current demand. It is probable, therefore, that the market will remain firm for some time to come, though it is expected that the position will be eased somewhat by shipments due to arrive early in May. Meantime milk supplies at home are on the increase, but the supply of English cheese will be far and away behind the total demand.

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Quebec, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1496. Flour.—A firm in Johannesburg would like to receive Canadian flour.

1497. Flour.—A firm in Durban, Natal, would like to represent a Canadian flour mill direct.

1498. Cheddar Cheese.—A firm in Johannesburg are desirous of getting in touch with Canadian manufacturers of mild cheddar cheese in 40- and 20-pound packages.

1499. Cheese.—An Exeter (England) firm of produce importers desire to obtain best quality Canadian white cheese for May delivery. Quotations on 500-box quantities c.i.f. Avonmouth.

1500. Honey.—A Bristol firm would be glad to receive quotations accompanied by samples of Canadian honey.

1501. Canned Fruits.—A large wholesale grocer in the Bristol area is prepared to receive quotations for Canadian canned pears, peaches and apricots.

1502. Dried Apples.—An importer in Hamburg, Germany, is open to receive offers from Canadian suppliers of evaporated apple rings for delivery next season.

1503. Lard.—An Exeter (England) firm of produce importers desire quotations c.i.f. Avonmouth in sterling on lard in 500-box lots. Terms thirty days' sight with documents attached.

1504. Bacon.—A produce importer in the Bristol area desires quotations c.i.f. Avonmouth for Canadian bacon in 500-box quantities for delivery in July and later.

1505. Salmon, Fish Oil, Flour.—A firm in Cape Town would like to receive Canadian salmon, fish oil, and flour.

Miscellaneous

1506. Boots and Shoes.—A Genoa firm would like to import boots and shoes from Canada.

1507. Boots and Shoes.—A firm in Rome would like to secure Canadian boots and shoes.

1508. Sports Boots and Shoes and Sporting Goods.—The foregoing are requested by a Turin firm anxious to deal with Canadian exporters.

1509. Special Alpine and Hunting Boots.—A concern in Milan would be willing to import from Canada Alpine and hunting boots.

1510. Broom Handles.—A Plymouth (England) firm of wholesale ironmongers desire quotations on broom handles for use in the manufacture of paint brushes.

1511. Clothes Pegs.—A Plymouth (England) firm of wholesale ironmongers desire quotations for spring clothes pins.

1512. Kitchen Cabinets.—A Bristol firm are desirous of obtaining an agency for a Canadian manufacturer of kitchen cabinets who is not already represented in the United Kingdom.

1513. Caustic Soda, Turpentine, Oils, Grease and Tallow, and Raw Materials for Industries are requested by a Turin house.

1514. Aniline Colours.—A concern in Naples interested in doing business with Canada would like to receive offers from Canadian exporters of aniline colours.

1515. Photographic and Cinematographic Supplies.—A firm in Genoa are anxious to be put in touch with Canadian houses handling the foregoing.

1516. Cinema Films.—A Trieste firm would like to import cinema films from Canada.

1517. Hides.—A large tanning company in Exeter (England) desire quotations on Canadian hides. Quotations and fullest particulars.

1518. Leather.—A firm in Cape Town would like to receive Canadian leather.

1519. Lubricating Oils and Greases.—A company in Genoa desire to import from Canada.

1520. Stoves.—A firm in Cape Town would like to receive Canadian stoves.

1521. Paper.—A Plymouth (England) importer desires quotations on M.G. sulphite for book making in 10-ton quantities.

1522. Kraft.—A Plymouth (England) firm desire quotations for Canadian kraft in 5- to 10-ton quantities in two deliveries; quality suitable for wrapping paper.

1523. Wallpaper.—A firm in Cape Town would like to receive Canadian wallpaper.

1524. Crown Corks.—A firm in Cape Town would like to receive crown corks.

1525. Soda Ash.—A firm in Cape Town would like to import Canadian soda ash.

1526. Vacuum Cleaners.—Importers in Bristol are desirous of obtaining agency for Canadian manufacturer of small vacuum cleaners.

1527. Proprietary Articles.—A London firm wish to obtain sole agencies of Canadian manufacturer for the United Kingdom. They claim to possess a sales organization covering particularly furniture and house furnishings, and desire to get into touch with Canadian manufacturers of proprietary articles to whom their connection would be of service.

1528. Cotton Fleece Underwear; Canvas and Duck.—The Acting Trade Commissioner in Buenos Aires has been requested by a manufacturer's representative to obtain samples and quotations from Canadian firms manufacturing canvas and duck; and cotton fleece underwear. Samples of goods in demand in Argentina and Uruguay are available on application to the Director, Commercial Intelligence Service, Ottawa.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From Montreal

To Avonmouth.—Oxonian, White Star-Dominion Line, May 2; Concordia, Cunard Line, May 5; Welshman, White Star-Dominion Line, May 12.

To Cardiff and Swansea.—Canadian Challenger, May 4; Canadian Mariner, May 18; Canadian Explorer, June 1—all of the Canadian Government Merchant Marine.

To Glasgow.—Metagama, Canadian Pacific Steamships, Ltd., May 3; Athenia, Anchor-Donaldson Line, May 4; Marvale, Canadian Pacific Steamships, Ltd., May 10; Saturnia, Anchor-Donaldson Line, May 11.

To Hull.—Ariano, Furness Line, May 8; Comino, Furness Line, May 22.

To Liverpool.—Montcalm, Canadian Pacific Steamships, Ltd., May 4; Canada, White Star Line, May 5; Montrose, Canadian Pacific Steamships, Ltd., May 11; Kastalia, Cunard Line, May 11; Regina, White Star Line, May 12.

To London.—Valacia, Cunard Line, April 28; Bolingbroke, Canadian Pacific Steamships, Ltd., May 5; Ausonia, Cunard Line, May 5; Hoerda, I.C. Transports, Ltd., May 7; Brecon, Canadian Pacific Steamships, Ltd., May 12; Virgilia, Cunard Line, May 12.

To London and Antwerp.—Canadian Victor, May 9; Canadian Commander, May 23; Canadian Planter, June 6—all of the Canadian Government Merchant Marine.

To Manchester.—Manchester Regiment, May 10; Manchester Shipper, May 17; Manchester Division, May 24; Manchester Brigade, May 31; Manchester Hero, June 7—all of the Manchester Liners, Ltd.

To Newcastle and Leith.—Cairndhu, April 27; Cairnvalona, May 4; Cairntorr, May 11; Cairnavon, May 18; Cairnmona, May 25—all of the Thomson Line.

To Southampton.—Minnedosa, Canadian Pacific Steamships, Ltd., May 9; Melita, Canadian Pacific Steamships, Ltd., May 23.

To Belfast.—Rathline Head, Head Line, May 25.

To Cork.—Carrigan Head, Head Line, May 30.

To Dublin.—Melmore Head, Head Line, May 25.

To Norwegian Ports.—Idefjord, Norwegian-American Line, May 19.

To Rotterdam.—Welland County, I.C. Transports, Ltd., May 10; Lord Dufferin, I.C. Transports, Ltd., May 24; Seattle Spirit, Rogers & Webb, May 24; Kenbane Head, Head Line, May 30.

To Hamburg.—West Kebar, Rogers & Webb, May 5; Welland County, I.C. Transports, Ltd., May 10; Lord Dufferin, I.C. Transports, Ltd., May 24; Seattle Spirit, Rogers & Webb, May 24.

To Copenhagen.—Pennsylvania, Scandinavian-American Line, about May 20; Arkansas, Scandinavian-American Line, about June 20.

To Antwerp.—Rawtry, Canadian Pacific Steamships, Ltd., May 5; West Kebar, Rogers & Webb, May 5; Minnedosa, Canadian Pacific Steamships, Ltd., May 9; Melita, Canadian Pacific Steamships, Ltd., May 23.

To Havre.—Hoerda, I.C. Transports, Ltd., May 7; Essex County, I.C. Transports, Ltd, May 20.

To South African Ports.—Benguela, Elder-Dempster Line, May 5.

To New Zealand and Australia.—Atholl, New Zealand SS. Co., May 10; Canadian Pioneer, Canadian Government Merchant Marine, May 26; Canadian Cruiser, Canadian Government Merchant Marine, June 26.

To Bermuda, Barbados, Trinidad and Demerara.—Berwyn, Canadian Pacific Steamships, Ltd., May 8; Bedwyn, Canadian Pacific Steamships, Ltd., May 23.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—Canadian Forester, May 3; Canadian Fisher, May 24—all of the Canadian Government Merchant Marine.

To St. Kitts, Antigua, Barbados, Trinidad and Demerara.—Canadian Squatter, May 5; Canadian Carrier, May 16; Canadian Otter, May 30—all of the Canadian Government Merchant Marine.

To Havana.—A steamer, Guy Tombs, Ltd., May 3.

To St. John's (Nfld.), via Charlottetown.—Canadian Sapper, Canadian Government Merchant Marine, May 5, 26, and June 16.

To St. John's (Nfld.).—Mapledawn, Canada Steamship Line, May 5.

From Quebec

To Liverpool.—Montlaurier, Canadian Pacific Steamships, Ltd., May 18.

To Southampton.—Empress of Scotland, Canadian Pacific Steamships, Ltd., May 12; Empress of Britain, Canadian Pacific Steamships, Ltd., May 26.

To Hamburg.—Empress of Scotland, Canadian Pacific Steamships, Ltd., May 12.

From Halifax

To Liverpool and Queenstown.—Megantic, White Star-Dominion Line, April 22.

To Plymouth, Cherbourg and London.—Antonia, Cunard-Anchor-Donaldson Line, April 23.

To Bermuda, St. Kitts, Antigua, Montserrat, Dominica, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad and British Guiana.—Royal Mail Steam Packet Co., April 27 and every fortnight.

To St. John's (Nfld.).—Belvernon, Tri-National SS. Corporation, April 28.

From St. John

To London.—Ariano, Furness Line, April 24; Canadian Conqueror, Canadian Government Merchant Marine, April 25.

To Manchester (via Halifax).—Manchester Corporation, Manchester Line, April 26.

To Liverpool.—Marloch, Canadian Pacific Steamships, Ltd., April 27.

To Glasgow and Avonmouth.—Cabotia, Cunard-Anchor-Donaldson Line, April 26.

To Southampton.—Empress of Britain, Canadian Pacific Steamships, Ltd., April 24.

To Cherbourg, Southampton and Hamburg.—Empress of Britain, Canadian Pacific Steamships, Ltd., April 24.

To Hamburg.—Empress of Britain, Canadian Pacific Steamships, Ltd., April 24.

To Hull.—Ariano, Furness Line, April 24.

To Havana.—A steamer, Nagle & Wigmore, April 30.

To Australia and New Zealand.—Atholl, New Zealand Shipping Co., April 25.

To Rio de Janeiro, Santos, Montevideo and Buenos Aires.—Hortensius, Houston Line, April 25.

From Vancouver

To Yokohama, Kobe, Nagasaki.—Arabia Maru, Osaka Shosen Kaisha, May 12.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Shedzuoka Maru, Nippon Yusen Kaisha, May 1; Empress of Russia, Canadian Pacific Steamships, Ltd., May 17.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Canada, Canadian Pacific Steamships, Ltd., May 3; President McKinley, Admiral Oriental Line, May 2; President Jackson, Admiral Oriental Line, May 14.

To Yokohama, Kobe and Moji.—Arabia Maru, Osaka Shosen Kaisha, May 12.

To Yokohama and Kobe.—Hakata Maru, Nippon Yusen Kaisha, April 28; Tokiwa Maru, Nippon Yusen Kaisha, May 7.

To Yokohama, Kobe and Shanghai.—Canadian Freighter, Canadian Government Merchant Marine, April 30; Stuart Dollar, Dollar Line, April 28; Canadian Prospector, Canadian Government Merchant Marine, May 30.

To Yokohama, Kobe, Hong Kong and Manila.—Philoctetes, Blue Funnel Line, April 28; Tyndareus, Blue Funnel Line, May 26.

To India.—Canadian Winner, Canadian Government Merchant Marine, June 20.

To Honolulu, Suva, Auckland and Sydney.—Makura, Canadian-Australasian Line, April 27; Niagara, Canadian-Australasian Line, June 1.

To Auckland, Melbourne and Sydney.—Hauraki, Canadian-Australasian Royal Mail Line, May 10.

To Auckland, Sydney, Melbourne and Adelaide.—Canadian Skirmisher, Canadian Government Merchant Marine, April 25; Canadian Traveller, Canadian Government Merchant Marine, May 25.

To Napier, New Plymouth, Lyttleton and Dunedin.—Waihemo, Canadian-Australasian Line, May 16.

To Liverpool, London, Rotterdam and Antwerp.—Loch Katrine, Royal Mail Steam Packet Co., second half of May.

To Rotterdam, London and Antwerp.—Moerdyk, Royal Mail Steam Packet Company, loading late April; Drechtydyk, Royal Mail Steam Packet Co., first half of June.

To Balboa (Canal Zone) and Callao (Peru).—Remus, Latin-American Line, about April 21.

To Supe, Chicama, Callao, Mollendo, Arica, Guayaquil and Corinto.—Regulus, Latin-American Line, about May 25.

To Salina Cruz, San Jose de Guatamala, Balboa, Amapala, Corinto, and such other ports as cargo inducements offer.—Senaloa, Latin-American Line, May 20.

To Manchester (via Panama Canal).—Howick Hall, Manchester Lines, Ltd., June 6.

From Victoria

To Yokohama, Kobe, Shanghai, Manila and Hong Kong.—President McKinley, Admiral Oriental Line, May 2.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Canada, Canadian Pacific Steamships, Ltd., May 3.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Shidzuoka Maru, Nippon Yusen Kaisha, May 1; Yokohama Maru, Nippon Yusen Kaisha, May 16.

LIST OF ACTS ADMINISTERED AND PUBLICATIONS ISSUED BY THE DEPARTMENT OF TRADE AND COMMERCE

Copyrights Act (a). Cullers Act. Electricity and Fluid Exportation Act (b). Electricity Inspection Act (b). Electric Units Act (b). Gas Inspection Act (b). Gold and Silver Marking Act. Grain Act. Inspection and Sale Act. Inspection of Water Meters Act (d). Lead Bounties Act. Patent Act (a). Petroleum Bounty Act. Statistics Act (c). Trade Mark and Design Act (a). Timber Marking Act (a). Weights and Measures Inspection Act (d). Zinc Bounties Act.

MISCELLANEOUS

Annual Report of the Department of Trade and Commerce.
Annual Report of Board of Grain Commissioners for Canada.
Annual Report *re* Mail Subsidies and Steamship Subvention.
List of Licensed Elevators, etc.
Patent Office Record (Weekly) (a).
Annual Report of Weights and Measures, Electricity and Gas (d).
Dominion Grain Research Laboratory (1920).
Grain Inspection in Canada (1914).
Rules and Forms of the Canadian Patent Office (a).
Rules and Regulations made by the Board of Grain Commissioners.
Trial Shipments of Wheat from Vancouver via the Panama Canal to the United Kingdom (1918). (Out of print).

PUBLICATIONS OF THE COMMERCIAL INTELLIGENCE SERVICE (e)

Commercial Intelligence Journal, containing Reports of Trade Commissioners and other Commercial Information.
Canada-West Indies Conference (1920).
Canadian Economic Commission to Siberia (1919).
Fruit Production in Australia (1922).
German War and Its Relation to Canadian Trade (1914).
Indian Empire as a Market for Canadian Products (1922). (Price outside Canada, 35 cents).
Mexico as a Field for Exports (1921). (Price outside Canada, 35 cents).
Markets of Jamaica and the Republic of Colombia, Venezuela, and Panama (1922). (Price outside Canada, 35 cents).
Packing for Overseas Markets (1922). (Price outside Canada, 35 cents).
Report of Special Trade Commission to Great Britain, France and Italy. (French and English) (1916).
Russian Trade (1916).
Tariffs of the British West Indies (in leaflets).
Trade after the War (1916).
Timber Import Trade of Australia (1917).
Trade between Canada and the British West India Colonies (1920).
Trade of the New Countries of South-east Europe (1921). (Price outside Canada, 35 cents).
Trading Opportunities in Scandinavia (1922). (Price outside Canada, 35 cents).
Trading with Egypt (1921). (Price outside Canada, 35 cents).
Trade with Greece (1921).
Trade with South China (1918).
Trading with Spain (1920).
Trading with Switzerland (1922). (Price outside Canada, 35 cents).
Toy Making in Canada (1916).
West Africa and Its Opportunities for Canadian Trade (1921). (Price outside Canada, 35 cents).

PUBLICATIONS OF THE BUREAU OF STATISTICS

The following is an abbreviated list of publications of the Bureau of Statistics. For a complete list, see note (c).
Census of Canada (1911). VI Vols., Bulletins, etc.
Census of Prairie Provinces (1916).
Miscellaneous Statistics respecting the following: Criminal; Education; Finance (Provincial and Municipal); Transportation, including railways and tramways, express, telegraphs, telephones, water, etc.; Production, including agriculture, furs, fisheries, forestry, mining and manufactures; Vital (annual and monthly).
Year Book of Canada.
Report of the Dominion Statistician, Annual.
Trade of Canada (Imports and Exports), Annual and Monthly.
Trade (Internal), including grain, livestock, coal, prices, etc.

NOTE.—(a) Applications should be addressed to: Commissioner of Patents, Ottawa. (b) Applications should be addressed to: Director Gas and Electricity Inspection Service, Ottawa. (c) Applications should be adressed to: Dominion Statistician, Ottawa. (d) Applications should be addressed to: Director Weights and Measures Service, Ottawa. (e) Applications should be addressed to the Director, Commercial Intelligence Service, Ottawa.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 285 Beaver Hall Hill, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address Canadian.*

Australia

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil

E. L. McColl. Address for letters—Caixa Postal 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China

J. W. Ross. Address for letters—P.O. Box 300. Office—Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba

Address: 400 and 401 Teniente Rey 11, Havana. (Post Office Box 1290.) *Cable Address, Cantracom.*

France

Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland

Norman D. Johnston, Zuidblaak 26, Rotterdam, *Cable Address, Watermill.*

India and Ceylon

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy

W. McL. Clarke,. Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico

C. Noel Wilde. Address for letters, Apartado Num. 126 bis, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian.*

New Zealand

W. A. Beddoe, Union Buildings, Customs street Auckland. *Cable Address, Canadian.*

South Africa

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements

A. B. Muddiman, P.O. Box 121, Singapore. (Territory covers Straits Settlements. British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

Douglas S. Cole, Acting Trade Commissioner, Sun Building, Clare street, Bristol. *Cable Address, Canadian.*

Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States

Frederic Hudd, 44 Whitehall street, New York City. *Cable Address, Cantracom.*

Trade Commissioner P. W. Ward, formerly of Singapore, is at present temporarily attached to headquarters at Ottawa.

CANADIAN COMMERCIAL AGENTS

Australia

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark

C. E. Sontum, Grubbegd, N. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

Vol. XXVIII **April 28, 1923** **No. 1004**

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

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TABLE OF CONTENTS

Commercial Intelligence Journal

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SUBSCRIPTIONS TO THE *COMMERCIAL INTELLIGENCE JOURNAL* AND ITS ASSOCIATED PUBLICATIONS

The Department of Trade and Commerce desires to announce that, in view of the heavy expense now involved in the publication of the *Commercial Intelligence Journal*, commencing with the 1st of July next a nominal subscription price will be charged for this publication. The price therefor to addresses in Canada will be $1 per annum (single copies 5 cents each); and to addresses outside the Dominion $3.50 per annum (single copies 10 cents each).

Individuals and firms now in receipt of this publication should forward their subscriptions addressed to "The Accountant, Department of Trade and Commerce, Ottawa, Canada"; and it will be understood that those who do not forward their subscriptions before July 1 no longer desire to receive it, and their names will be removed from the mailing list.

It should be specially noted that those who pay an annual subscription will receive on request, without extra charge, the special reports issued from time to time in the form of Supplements to the *Commercial Intelligence Journal*. Those who are not on the regular mailing list may purchase these special reports at a cost of 25 cents each to addresses in Canada, and 35 cents outside the Dominion.

Remittances may be made by money or express orders, or drafts, or cheques, payable at par in Ottawa, or Canadian postage stamps.

RUBBER FOR STREET PAVING

Restriction of output as a temporary expedient may be necessary for the rubber planting industry, says the London *Times Trade Supplement*, but we have always maintained that the only real solution of the over-production problem is to find new uses for rubber. It is therefore with considerable interest that we read the result of the Southwark experiment in the use of rubber for paving. The High street, where the rubber was laid, carries traffic of 240 tons per yard width per hour. After two years' trial, the surveyor reports that the rubber has proved to be a most suitable material for road paving, showing a minimum of wear. The rubber was laid in slabs 9 in. by 3 in., vulcanized on expanded metal, and anchored to concrete.

EXPORTS FROM CANADA TO THE UNITED STATES OF PRINCIPAL COMMODITIES SUCH AS ARE PRODUCED ON CANADIAN FARMS, OR MANUFACTURED DIRECTLY FROM SUCH FARM PRODUCTS, DURING THE MONTH AND SIX MONTHS ENDED MARCH, 1920 to 1923; WITH UNITED STATES TARIFF RATES IN FORCE.

(COMPILED BY THE EXTERNAL TRADE BRANCH, DOMINION BUREAU OF STATISTICS)

Commodities		Month of March 1920	Month of March 1921	Month of March 1922	Month of March 1923	Six Months ended March 1920	Six Months ended March 1921	Six Months ended March 1922	Six Months ended March 1923	United States Tariff Rates in force: Prior to May 27, 1921	From May 27, 1921 to Sept. 21, 1922	Subsequent to Sept. 21, 1922
Animals (except for Improvement of Stock)—												
Cattle	No.	9,929	13,214	1,983	8,094	309,617	182,735	107,946	112,711	....	....	....
	$	561,717	734,007	41,454	252,081	27,417,109	13,567,637	2,002,837	3,173,006	Free	30 p.c.	(a)
Horses	No.	283	237	195	182	1,440	1,325	1,205	822	....	....	....
	$	41,744	36,460	87,867	23,859	241,270	309,129	286,364	116,889	10 p.c.	10 p.c.	(b)
Poultry	No.	10,620	11,887	10,865	9,247	492,083	555,762	558,868	408,917	....	....	....
	$	12,358	14,838	11,228	7,092	507,482	627,833	555,334	392,326	1c. per lb.	1c. per lb.	3c. per lb.
Sheep	No	1,112	1,220	6,217	75	137,459	121,473	58,065	29,347	....	....	....
	$	17,557	9,642	60,085	1,500	1,471,887	1,095,200	325,077	193,523	Free	(c)	$2 per head
Fruits—												
Apples, green or ripe	Brl.	41,632	342	821	349	217,112	12,019	393,307	61,727	....	....	....
	$	101,852	1,797	593	1,728	762,876	60,578	2,000,700	288,527	10c. per bush.	30c. per bush.	25c. per bush.
Apples, dried	Lb.	297,160	....	....	....	586,073	....	658,754	29,200	....	....	....
	$	23,191	....	....	....	78,530	....	76,092	2,920	1c. per lb.	1c. per lb.	2c. per lb.
Berries, fresh	$	2	51	330	2,919	31,094	28,874	46,227	59,940	½c. per qt.	½c. per qt.	1c. per lb.
Grains—												
Barley	Bush.	44	55	1,318	200	62,162	183	4,044	936,823	....	....	....
	$	135	107	695	100	80,456	235	2,261	497,745	15c. per bush.	15c. per bush.	20c. per bush.
Beans	Bush.	208	948	29	18,021	3,169	2,723	3,521	68,513	....	....	....
	$	1,070	4,025	121	56,807	15,462	11,056	10,599	208,052	25c. per bush.	$1.20 per bush.	$1.05 per bush.
Buckwheat	Bush.	17,608	31,191	12,274	28,196	59,654	201,625	88,912	204,117	....	....	....
	$	28,446	34,855	11,104	23,044	90,435	233,051	72,551	167,691	Free	Free	10c. per cwt.
Oats	Bush.	852,507	494,866	213,528	19,130	2,411,505	1,098,004	1,452,160	171,745	....	....	....
	$	759,482	245,464	111,323	9,238	2,057,305	625,743	681,722	88,269	6c. per bush.	6c. per bush.	15c. per bush.
Pease, whole	Bush.	11,161	14,618	20,179	27,207	47,241	43,618	95,777	139,642	....	....	....
	$	66,404	58,793	80,547	91,688	301,503	237,131	319,285	364,674	10c. per bush.	10c. per bush.	60c. per bush.
Pease, split	Bush.	2,638	1,400	83	125	7,208	1,600	14,455	3,157	....	....	....
	$	10,931	3,864	288	430	25,568	4,440	54,180	9,937	20c. per bush.	20c. per bush.	75c. per bush.
Rye	Bush.	72,518	12,770	2,888	150	424,673	290,333	81,352	436,215	....	....	....
	$	124,748	20,507	2,863	75	644,913	475,669	66,613	334,460	Free	Free	15c. per bush.
Wheat	Bush.	224,363	3,131,237	42,291	85,813	2,242,284	40,598,547	9,261,079	8,886,689	....	....	....
	$	665,588	5,835,656	55,234	84,467	5,316,709	86,799,223	10,372,270	9,535,936	Free	35c. per bush.	30c. per bush.
Grain Products—												
Bran, shorts and middlings	Cwt.	9,990	131,921	3,794	148,309	279,618	700,486	264,880	1,444,495	....	....	....
	$	24,798	166,959	6,209	199,728	632,731	1,188,368	262,007	1,635,536	10 p.c. or Free	10 p.c. or Free	15 p.c.
Wheat Flour	Brl.	5,954	198,968	71,063	25,034	27,586	1,094,003	413,766	298,477	....	....	....
	$	77,931	1,749,516	437,098	163,770	317,312	10,863,352	2,510,621	1,786,449	Free	20 p.c.	78c. per cwt.
Meats—												
Bacon, hams, shoulders and sides	Cwt.	1,365	372	138	179	6,502	2,093	696	778	....	....	....
	$	32,762	13,078	4,405	5,588	169,276	76,639	22,028	25,581	Free	25 p.c.	2c. per lb.
Beef, fresh, chilled or frozen	Cwt.	25,199	18,545	7,726	4,457	196,494	146,793	107,040	83,072	....	....	....
	$	443,829	285,864	105,228	50,303	3,158,925	2,150,577	1,148,997	969,340	Free	2c. per lb.	3c. per lb.

Mutton and lamb, fresh, chilled or frozen	Cwt.	3,499	244	2,369	.....	40,312	40,317	54,780	12,098	.....	.....	.....
	$	80,037	6,385	44,258	.....	887,533	1,029,221	929,891	294,304	Free	2c. per lb.	(d)
Pork, fresh, chilled or frozen	Cwt.	1,091	141	638	1,581	5,371	4,608	5,219	4,366	.....	.....	.....
	$	30,381	7,271	19,893	37,387	127,793	176,607	125,664	116,747	Free	2c. per lb.	¾c. per lb.
Pork, dry-salted and pickled	Cwt.	73	.....	.....	.....	3,518	622	331	5	.....	.....	.....
	$	1,084	.....	.....	.....	86,939	9,795	1,917	99	Free	25 p.c.	2c. per lb.
Poultry, dressed or undressed	$	23,648	12,182	14,655	19,553	110,835	460,692	684,791	549,229	2c. per lb.	2c. per lb.	6c. per lb.
Other meats, including canned meats, but excluding extracts	Cwt.	2,108	1,867	1,372	2,156	17,566	10,887	5,428	6,533	.....	.....	.....
	$	41,011	40,209	20,021	37,803	251,145	188,126	60,945	117,410	Free	25 p.c.	20 p.c.
Milk and milk products—												
Butter	Lb.	2,587,703	19,590	32,352	67,043	6,933,649	1,502,253	2,625,677	2,348,741	.....	.....	.....
	$	1,506,927	4,693	6,303	23,036	3,927,231	748,841	957,111	960,023	2½c. per lb.	6c. per lb.	8c. per lb.
Cheese	Lb.	166,944	5,644	397,008	5,800	3,474,036	275,394	2,934,382	1,974,600	.....	.....	.....
	$	47,065	2,551	62,895	1,563	916,931	76,849	451,216	372,224	20 p.c.	23 p.c.	(e)
Cream	Gal.	41,168	31,601	73,661	81,224	258,249	386,393	726,014	570,233	.....	.....	.....
	$	56,664	47,987	96,502	160,866	422,011	627,687	1,050,454	1,080,889	Free	5c. per gal.	20c. per gal.
Milk, fresh	Gal.	144,339	96,206	105,716	89,148	1,032,000	525,955	651,670	480,677	.....	.....	.....
	$	41,147	24,065	24,119	22,267	318,472	161,607	152,755	111,961	Free	2c. per gal.	2½c. per gal.
Milk, condensed, including milk powder	Lb.	1,090,346	1,864,388	.....	427,660	5,435,098	5,905,757	88,257	5,321,387	.....	.....	.....
	$	183,460	322,335	.....	51,593	901,463	989,899	16,884	666,341	Free	2c. per lb.	1c.—1½c. lb.
Seeds—												
Clover seed, alsike	Bush.	5,494	31,801	16,349	7,101	79,956	58,079	88,145	35,709	.....	.....	.....
	$	175,107	345,355	152,301	51,192	2,091,310	685,850	797,848	245,383	Free	Free	4c. per lb.
Clover seed, alfalfa and red	Bush.	17	1,017	2,678	47	2,798	1,972	6,700	71	.....	.....	.....
	$	642	11,521	30,716	742	78,260	20,994	68,125	1,091	Free	Free	4c. per lb.
Clover seed, other	Bush.	3,573	40,123	25,862	27,507	45,001	54,847	41,101	74,543	.....	.....	.....
	$	65,131	161,781	113,660	132,010	778,115	235,245	164,304	366,272	Free	Free	(f)
Flaxseed	Bush.	89,386	14,076	19,413	217,795	449,332	829,072	1,425,165	1,705,763	.....	.....	.....
	$	447,125	25,443	45,942	505,393	2,177,947	1,740,138	2,661,951	3,622,611	20c. per bush.	30c. per bush.	40c. per bush.
Grass seed	Bush.	7,324	15,040	10,637	6,613	29,348	76,354	63,502	51,953	.....	.....	.....
	$	18,277	29,825	38,186	13,409	98,877	156,985	260,641	100,156	Free	Free	2c. per lb.
Vegetables—												
Potatoes	Bush.	666,877	351,023	387,066	84,189	3,621,688	1,787,796	1,220,418	288,607	.....	.....	.....
	$	1,446,949	184,262	208,293	54,995	5,077,946	1,446,750	875,267	223,279	Free	25c. per bush.	50c. per cwt.
Sugar beets	Ton.	.....	.....	.....	.....	7,723	11,502	10,481	11,430	.....	.....	.....
	$	.....	.....	.....	.....	70,235	103,175	63,151	56,730	5 p.c.	5 p.c.	80c. per ton
Turnips	Bush.	136,118	122,792	95,617	250,063	1,922,171	1,622,230	1,546,684	1,857,548	.....	.....	.....
	$	76,627	29,584	32,113	41,904	873,164	390,192	419,426	266,677	15 p.c.	15 p.c.	12c. per cwt.
Miscellaneous Products—												
Eggs	Doz.	5,165	3,054	1,109	421	75,338	137,267	111,798	70,987	.....	.....	.....
	$	3,317	1,267	377	195	47,659	89,008	53,639	30,232	Free	Free	8c. per doz.
Hay	Ton	26,116	9,071	410	7,472	111,185	51,602	1,263	13,465	.....	.....	.....
	$	529,631	182,502	6,327	75,169	1,933,309	1,138,301	27,258	143,798	$2 per ton	$2 per ton	$4 per ton
Maple sugar	Lb.	202,302	49,268	233,332	23,654	933,152	1,216,503	1,441,754	145,966	.....	.....	.....
	$	54,981	7,690	20,889	5,340	267,714	284,533	110,231	33,500	3c. per lb.	3c. per lb.	4c. per lb.
Tallow	Cwt.	15	944	1,986	6,623	17,489	9,835	10,489	11,418	.....	.....	.....
	$	209	5,916	9,696	54,476	275,805	67,369	56,471	89,876	Free	Free	½c. per lb.
Wool	Lb.	464,330	482,540	117,817	764,558	2,896,396	5,444,226	247,689	4,476,586	.....	.....	.....
	$	312,815	147,629	21,327	267,943	1,783,539	1,334,682	35,494	1,400,914	Free	(g)	(g)
Total value of above commodities	$	8,136,780	10,815,936	1,985,145	2,531,253	66,825,076	130,517,281	30,841,199	30,700,547	.....	.....	.....

(a) Cattle weighing less than 1,050 pounds, 1½c. per lb.: 1,050 pounds or over, 2c. per lb. (b) Horses valued at not more than $150 each, $30 per head: more than $150 each, 20 per cent. (c) Sheep, one year old or over, $2 per head: less than one year old, $1 per head. (d) Mutton fresh, 2½c. per lb.: lamb, fresh, 4c. per lb. (e) Cheese, 5 c. per lb. but not less than 25 per cent. (f) Clover seed, crimson, 1c. per lb.: white, 3c. per lb. and other, 2c. per lb. (g) Dutiable at various rates. See *Commercial Intelligence Journal* No. 974, Sept. 30, 1922, pages 516–7.

MARKETING RUBBER GOODS IN AUSTRALIA

Trade Commissioner D. H. Ross

Melbourne, Australia, March 19, 1923.—During the last three years, in common with other lines, the importation of rubber goods into Australia has shown considerable variation and for the fiscal year ended on June 30, 1922 (for which the trade returns are not yet published), marked contraction. The effect of the recently imposed high customs duties is distinctly noticeable in lines which Australian rubber companies have shown a distinct improvement in manufacturing, and this competition is likely to have an even more decided bearing upon future trade.

As the result of alert investigation, and interviews with leading wholesale importers, it is hoped that this review of the present position in regard to the production of Australian rubber factories, and in reference to the importation of rubber goods, will serve a useful purpose to Canadian manufacturers and exporters of this class of goods. Some minor, although not unimportant, articles of rubber are not specifically dwelt upon in this report, but any special inquiries in regard to the elimination of these details are assured of the prompt and careful investigation of this office.

As in other lines successfully placed upon the Australian market, capable representation, either by direct travellers from the factory or through the appointment of capable agents, is an essential factor to secure trade. This aspect of the trading situation is referred to at greater length in a subsequent paragraph.

THE RUBBER MANUFACTURING INDUSTRY IN AUSTRALIA

Official statistics indicate that in 1921 there were forty-eight factories manufacturing rubber goods in Australia—as compared with twenty-eight in 1914—but with the exception of three, or possibly four, factories, the majority are small industries with restricted output.

Australia, as compared with other countries, is in the main favourably situated to the sources of supplies of most of the raw materials required in the manufacture of rubber goods. It is claimed that, in regard to raw rubber, Australia is under no comparative disadvantage, but inversely it is admitted that domestic manufacturers are not so well placed in respect to scrap rubber which is the basis for a large variety of cheaper goods.

Australian manufacturers of rubber goods are able to import practically all their materials free of duty, and they derive substantial benefit by the high protective duties—and the natural protection of ocean freights and other importing charges—over the finished product of oversea competitors.

Under the abnormal conditions existing during the period of the Great War, Australian rubber industries received a great trading impetus and made considerable expansion, although in the more recent period they, in common with similar factories in other countries, have suffered substantial losses, chiefly through the deflated values of raw rubber.

The following return is illustrative of the position of the three principal rubber companies in Australia:—

	Capital	Net Profit. 1922
Dunlop Rubber Co. of Australia	£1,691,342	£103,530
Perdriau Rubber Co., Ltd	523,487	58,612
Barnet Glass Rubber Co., Ltd	410,000	93,718 loss.

The profits have fluctuated considerably during the last three years, but recently it is claimed that the industry is upon a more stable basis.

FACTORIES MANUFACTURING RUBBER GOODS IN AUSTRALIA

The following return (the latest data available) shows the expansion in the rubber manufacturing industry in 1921 as compared with the pre-war period of 1914:—

	1921	1914
Number of factories	48	28
Number of employees	3,781	1,790
Actual horse-power of engines employed	8,207	2,215
Approximate value of land and buildings	£427,373	£128,355
Approximate value of plant and machinery	£624,659	£167,066
Total amount of wages paid during year	£587,743	£187,527
Value of fuel used	£74,528	£16,441
Value of raw material worked up	£1,729,139	£534,138
Total value of output	£2,744,874	£848,660
Value added in process of manufacture	£1,015,735	£314,522

RUBBER BELTING

The bulk of the requirements of rubber belting for the purposes of transmission and conveying—particularly in the mines throughout the Commonwealth—is undoubtedly being supplied by Australian manufacturers. During the last eighteen months considerable competition has had to be met by both importers and domestic manufacturers, caused chiefly because several importers, holding heavy stocks on a falling market, decided to dispose of their holdings to the best possible advantage, which admittedly meant serious losses in realization. The latter situation was to a great extent aggravated through the intermittent working of many mines in Australia, which position was created by strikes against reduction in wages, and—in some of the States—increasing the working week from 44 to the pre-war basis of 48 hours. Domestic manufacturers have strenuously forced sales—not always on a remunerative basis—and have secured a larger hold of the trade as many users of belting have direct interest in rubber and other manufacturing industries. The mines require good qualities and competitive prices, but in many cases prompt delivery is an essential factor in obtaining recurrent orders.

ELEVATOR AND CONVEYOR BELTING

Some years ago, considerable stocks of elevator and conveyor belting were imported from the United States, but Australian manufacturers met the competition by cutting prices, with the result that the realization of the oversea lines caused considerable loss. The chief difficulty in importing these types of belting is that it incurs the outlay of a large amount of money with no definite assurance of an ultimate profit. Further, the belting is generally required at short notice, thus giving no opportunity for special importations to arrive in time to meet requirements. Through protracted labour troubles at mines using the bulk of this belting, the demand has perforce fallen off considerably, and there does not appear to be any immediate prospects of an improvement.

Elevators for the bulk handling of grain have been constructed in New South Wales only, and this big belting contract was supplied by a Melbourne company although a number of importers tendered close quotations. The preference given to local manufacturers was doubtless of advantage in securing this business. Through these circumstances, no elevator or conveyor belting is now being imported into Australia for stock and subsequent resale, and probably very little is being imported on an indent basis.

As an indication that Australian rubber industries are capable of supplying conveyor belting of considerable magnitude, a Melbourne company supplied a specification which called for a belt (in seven sections) 4,875 feet long by 36 inches wide by $\frac{3}{4}$-inch thick, which weighed $30\frac{1}{4}$ long tons. This belt—made for conveying iron ore—has a capacity of 1 ton every 15 feet at a speed of 250 feet per minute.

RUBBER STEAM, AIR DRILL AND WATER HOSE

The chief types of hose used in Australia for steam and air drill are marline wound and ordinary jacket. Jacketed hose, however, is not used extensively.

In pre-war years, oversea (particularly British) makers controlled the bulk of the trade, and there is still some business being obtained by importers handling old-established brands of acknowledged quality. It must, however, be admitted that Australian manufacturers have secured practically the whole of the hose trade.

Dealers state that occasionally buyers demand a make of imported hose of which they have had satisfactory experience, for which they are prepared to pay a fair price, but the general tendency is to purchase a cheaper article, and this is specially catered for by domestic factories.

Very large quantities of hose are used by the Government railways and by city tramways—the latter generally being under Government or municipal control—and tenders frequently call for goods of Australian production upon which a marked preference is given over the quotations submitted for oversea lines In expert opinion, it is stated that the general run of steam and air drill hose of Australian manufacture has not yet reached the quality of imported lines which formerly held the bulk of the trade.

In so far as water hose—garden and delivery varieties—is concerned, very large quantities are made in Australia and are sold at prices much below the imported. The quality of domestic production is satisfactory, and it generally gives excellent wear. The sizes of garden hose in demand are ½-inch, ¾-inch and 1-inch, and considerable 5-ply is sold.

AUSTRALIAN TIRES FOR MOTOR CARS (AUTOMOBILES)

The most marked development in recent years in the rubber industry in Australia has been admittedly in the manufacture of pneumatic tires for motor cars. Highly skilled labour and up-to-date plant have been imported from abroad for the purpose of producing tires of superior quality to replace the large quantities formerly obtained from Europe—more particularly from Germany. At the present time the three leading rubber manufacturing companies in Australia (but more especially one of them) supply a considerable portion of the domestic demand. On interviewing prominent motor supply firms, it was stated that local tires have now so much improved in quality that these products have attained an established reputation despite the competition of oversea manufacturers. Through branch houses in all the Australian states, from which supplies are readily obtainable, and the system of the manufacturers consigning stocks to reputable garages for realization (i.e. on the basis of sale or return), under which the retailer is assured of a profit of not less than 25 per cent, local makers are steadily increasing their hold of the trade.

Four Australian rubber companies are now manufacturing pneumatic tires, and an expert estimate is that their production would probably aggregate 8,250 tires per week (the several companies' output being in the vicinity of 3,500, 2,500, 2,000 and 250 respectively), consisting mainly of fabric tires. Cord tires of domestic make have so far not gone much beyond the experimental stage, and generally the results have not been satisfactory, but progress is being made, and it may be a year hence before initial difficulties will be overcome and the quality equal to the present standard of their fabric tires. Australian tires have a wonderful sale, considering the comparatively limited number of cars in use, and they are listed at fairly reasonable prices.

IMPORTED PNEUMATIC TIRES

On reference to one of the appended tables it will be found, in the schedule in which tires are included, that the importations for the last three years, from the principal sources of supply, of pneumatic tires and tubes and solid tires are given as follows:—

Country of Origin.	1919-20 Value	1920-21 Value	1921-22 Value
Australia	£ 2,629	£ 2,765	£ 29,274
United Kingdom	70,851	170,526	67,502
Canada	304,430	243,289	86,019
New Zealand	42	21	501
Belgium	....	886	455
France	72,819	130,963	122,011
Italy	2,462	23,279	10,519
United States of America	431,262	652,129	269,656
Total imports (all countries)	£384,590	£1,224,328	£586,457

The figures for 1921-22, subject to correction, have been supplied, in advance of publication, through the courtesy of the Commonwealth Statistician.

Some oversea manufacturers of tires maintain their own offices and hold extensive stocks in Australia, while other companies are represented by direct travellers who arrange with dealers in all the states to carry stocks of their special make of tires.

It appears on investigation that practically all motor tires are sold on consignment basis, except where some special inducement is held out to one firm in each state to import, on a purchasing basis, in which case the exclusive distributing agency for their particular state is granted by the manufacturers to the importers. Under this arrangement it is stated that some importers purchasing outright are making substantial headway, but these buying agents are also compelled to consign to smaller dealers in country towns in order to compete with the terms offered by domestic and oversea competitors.

It is obvious, in importing sufficient stocks to maintain regular supplies, that much capital could be speedily locked up by purchasing agents, hence this method of importing and distributing does not embrace the largest Australian tire trade. On reliable authority, it is considered that the bulk of the United States tires sent to Australia is shipped on manufacturers' account to their own branch house or to their direct representatives.

Quite a number of oversea rubber companies have branch distributing houses in the chief Australian importing centres. At the present time, the principal brands of imported tires sold in Australia are "United States," "Dominion," "Goodyear," "Goodrich," "Michelin," "Firestone," "Fisk" and "Vacuum Cup." Several other brands are also imported, but not in large enough quantities to warrant special reference, although some British and French tires enjoy an excellent reputation and have a considerable sale through capable representation.

Importing firms, despite heavy customs duties and the natural protection of ocean freights and other importing charges, enjoy a considerable trade, and careful investigation leads to the conclusion (although it is impossible to obtain definite figures) that about 55 to 60 per cent of the tires sold in Australia are imported.

Practically all the pneumatic and solid truck tires are imported, while—with concurrent heavy importation of motor chassis (the bulk of the bodies being locally made)—the motor car tire trade is rapidly increasing. This position may, however, be very materially altered when the domestic production of cord tires has developed to the same extent as their fabric tires.

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CHIEF SIZES OF TIRES USED IN AUSTRALIA

While it is a difficult matter to determine the proportion of the total sales of each size of tire, because of the ever-changing standards of motor car and motor truck manufacturers, yet (based upon expert opinion) an approximate estimate of the Australian trade in both inches and millimetres is given thus:—

Proportion of Trade in Tires

Inch Sizes	Per Cent
30x3½ B.E.	30
31x4 B.E.	2½
31x4 S.S.	12½
32x4 S.S.	17½
32x4½ S.S.	2½
33x4 S.S.	7½
33x4½ S.S.	15
34x4½ S.S.	5
33x5 S.S.	2½
35x5 S.S.	5
	100

Metric Sizes	Per Cent
710x90 B.E.	2
760x90 B.E.	10
765x105 B.E.	15
815x105 B.E.	30
820x120 B.E.	5
895x105 B.E.	2
880x120 B.E.	20
920x120 B.E.	2
820x135 B.E.	2
880x135 B.E.	7
895x135 B.E.	2
935x135 B.E.	2
895x150 B.E.	1
	100

(B.E.=beaded edge; S.S.=straight side)

It may, however, be assumed that almost all of the present day standards—inch and metric—are used in Australia.

SOLID AND PNEUMATIC TRUCK TIRES

The number of motor trucks in Australia—in comparison with other countries—is limited. Recently, through capable representation, the trade has shown encouraging expansion. So far the demand for truck tires has not been a large one, but (such as it is) these requirements—solid and pneumatic—are all imported. Careful inquiry has indicated the following approximate estimate of the sizes in demand:—

Solid Truck Tires

Inch sizes	Per cent
32x3½	1
32x4	4
34x4	8
34x5	7
34x6	2
34x7	2
34x8	1
36x3	1⅘
36x3½	9
36x4	15
36x5	15
36x6	6
36x7	9
36x8	3
36x10	⅗
36x12	⅗
40x5	3
40x6	¾
40x8	9/20
40x10	10½
40x12	3/10
	100

Metric sizes	Per cent.
100 sections for 720 mm.	2½
120 " " "	35
140 " " "	10
160 " " "	2½
100 sections for 771 mm.	¾
120 " " "	10½
140 " " "	3
160 " " "	¾
100 sections for 850 mm.	0.125
120 " " "	0.375
140 " " "	3
160 " " "	1½
120 sections for 881 mm.	1½
140 " " "	19½
160 " " "	9
	100

Pneumatic Truck Tires

Inch Sizes and Percentages—32x4½ inches, 22½ per cent; 34x4½, 5 per cent; 33x5, 10 per cent; 34x5, 20 per cent; 35x5, 10 per cent; 36x6, 22½ per cent; 38x7, 8 per cent; 40x8, 2 per cent.

Exporters of truck tires to Australia should not overlook that (with rare exception) the "long" ton of 2,240 pounds is the standard, hence, in estimating loading capacities, they should make provision for an additional 240 pounds for equipping motor vehicles. Obviously, if the Canadian and United States standards were supplied, the truck in use in Australia would be under-shod.

MOTOR-CYCLE TIRES

In recent years there has been a remarkable expansion in the importations of motor-cycles. The number of this popular means of rapid transit in use in Australia is abnormally large in comparison with other types of motor vehicles. Many motor-cycles are fitted with handsomely equipped side cars (which can readily be detached), in which case three tires are required.

The proportion of each size of motor-cycle tires in demand is estimated as follows:—

Motor-cycle Tires

Inch Sizes and Percentages—26x2¼, 5 per cent; 26x2½, 10 per cent; 26x2½x2¼, 15 per cent; 26x3, 5 per cent; 28x3, 40 per cent; 27x3½, 15 per cent; 29x3⅛, 10 per cent.

BICYCLE TIRES AND TUBES

Few bicycle tires and tubes are imported in comparison with the large quantity produced by Australian manufacturers of rubber goods. The value of the importations is not shown in a separate classification, but is included with tires of other character. One factory in Melbourne has the largest output of these goods, including the requisite rims. It is estimated that there are several hundred thousand bicycles in use in Australia, hence the constant demand for tires chiefly of the wired-edge variety.

The proportion of sizes of tires is approximately:—

Inch Sizes and Percentages—28x1¼, 1 per cent; 28x1⅜, 85 per cent; 28x1½, 3 per cent; 28x1¾, 7 per cent; 26x1¼, 1 per cent; 26x1⅜, 1 per cent; 26x1¾, 1 per cent; 18x1⅜, 1 per cent.

Computing Customs Duties on Tires

On tires accompanying motor cars, the basis in computing the Commonwealth customs duties is the net consumer's price list in the country of origin. On tires shipped separately (not with cars) to wholesale Australian importers, the basis of valuation is the wholesale domestic list price—less discount—applying to similar quantities sold for home consumption in the country of origin.

The present customs duties under the general tariff are 44 per cent net or 2s. 6d. (61 cents) per pound, and the preferential rate applicable to the United Kingdom only 27½ per cent net or 1s. 6d. (36 cents) per pound, whichever rate, in each instance, returns the higher duty. The bulk of the tires imported into Australia is dutiable at the specific rates which work out, on expert authority, at from 70 to 80 per cent net on invoice values according to the weight of the tire.

ADVERTISING TIRES IN AUSTRALIAN PAPERS

In each Australian centre it is the practice of the principal daily newspapers, at least one day a week, to give considerable space to descriptive matter in respect to the latest developments in the motor car and allied industries. In addition to the more limited daily announcements, it has become the estab-

lished practice for dealers to insert, in the special issues, large display advertisements of motor cars, sundries and, especially, tires. Some weekly newspapers, of a type not familiar in Canadian journalism (such as *The Australasian*, published in Melbourne, and *The Bulletin*, in Sydney) have an immense circulation throughout the Commonwealth and New Zealand, and form most valuable advertising channels. Both of these newspapers have for some time been extensively used by the representatives of oversea tire manufacturers. Then there are the regular monthly motor trade and other trade journals, Australian magazines, etc., which are also used by dealers in motor cars and equipment.

It is admitted that new lines of tires, however estimable, require a very substantial allotment to defray the cost of the advertising which is necessary to obtain business.

Australian, British, United States, and Canadian tires are largely advertised. The cost of this publicity campaign, as well as that of printed matter sent through the mails, is mainly at the expense of the manufacturers, although in the case of purchasing agents this expenditure is one of arrangement with the suppliers whereby a special allowance is made for the purpose.

It may be emphasized that, in so far as rubber goods are concerned, practically all the advertisements appearing in Australian daily, weekly and monthly journals feature motor tires only. The names of the manufacturers (or the special brand), together with the names of the distributing agents in all the Australian states, are clearly indicated, while in a few instances the prices to individual buyers are also set out.

AUSTRALIAN CANVAS AND RUBBER FOOTWEAR

Australian canvas shoes have been made, chiefly by a Sydney, N.S.W., company, for some years. Other Australian rubber companies have from time to time attempted similar production, but have not persevered with the line. So far the domestic makes have been of low and medium grades which cannot compete either in shapes, quality, or finish with imported goods. Price is the chief selling factor of rubber footwear made in Australia, which line enjoys an almost prohibitive customs duty on the cheaper grades of sand shoes.

IMPORTED RUBBER FOOTWEAR

The lines of rubber footwear of particular interest to Canadian manufacturers are sand and tennis shoes, of which hundreds of thousands of pairs are annually sold in Australia, and to a lesser extent rubbers (goloshes) and gum and wading boots. While the demand for sand and tennis shoes is greater in the early spring and summer months, yet a steady market exists all the year round.

Two brands—" Fleetfoot " and " Maltese Cross "—of Canadian manufacture have the greatest sale in Australia of all canvas shoes of medium and better grades. The range of these goods is considered by wholesale dealers to be the best imported by reason of style, fit, and wearing qualities, the prices being competitive for the lines offered. Recently, through energetic representation, a new line " A.H.M." of Canadian rubber footwear is, on its merits, being successfully introduced into Australia with encouraging indications of a rapidly increasing trade. The other chief competing lines are the " North British " from Scotland, and " Keds " and " Hood " from the United States, although the latter brands are not largely imported. The " North British " has recently catered for the cheaper trade—such as that in (grey) plimsolls—together with a fair quantity of white shoes.

Rubbers (goloshes) and rubber boots have been made to a very limited extent in Australia, but their production has not so far been a success through (apparently) indifferent shapes and finish not meeting the standard of requirements. In this line also the well-known Canadian brands of "Dominion," "Anchor," and "Maltese Cross" are well established in this market, in competition with "North British" and the United States brands of "Rhode Island," "Woonsocket," and "Hood."

The imports of gum and wading boots are limited. Hip gum boots are little called for, and the demand for knee boots is not extensive.

IMPORTATIONS OF AND DUTIES UPON RUBBER FOOTWEAR

The extent of the importations of Canadian rubber footwear into Australia, in comparison with importations from other principal countries, during the last three fiscal years is thus illustrated:—

Goloshes and Rubber Sand Boots, Rubber Sand Shoes, and Plimsolls

Importations from	1919–20 Value. £	1920–21 Value. £	1921–22 Value. £
United Kingdom	11,147	56,572	25,835
Canada	72,161	103,069	22,667
United States of America	19,752	7,664	1,454
Total from all Countries	£103,206	£167,369	£49,969

Rubber Gum and Wading Boots

The importation of rubber boots—gum and wading—from the principal countries, are indicated thus:—

Importations from	1919–20 Value. £	1920–21 Value. £	1921–22 Value. £
United Kingdom	1,639	657	2,968
Canada	1,760	8,901	4,121
United States of America	2,377	3,049	2,160
Total from all Countries	£5,776	£12,638	£9,261

The present customs duties on rubber footwear give very high protection to the Australian manufacturers, and particularly so on the cheaper lines of children's and other sand shoes. The duties now ruling are 1s. 6d. (36 cents) per pair or 27½ per cent net on goods made in the United Kingdom only, and 2s. (48 cents) per pair or 38½ per cent net on goods made in all other countries —including Canada—whichever rate returns the higher duty.

MARKING NECESSARY ON RUBBER FOOTWEAR

The regulations under the Commonwealth Commerce (Trade Descriptions) Act in regard to all importations are strictly enforced, hence it is imperative that Canadian manufacturers must carefully observe the required marking necessary on rubber footwear on all shipments made to Australia. The requirements are as follows:—

Commerce Act—Marking on Shoes of Cotton and Rubber. In the case of all boots made of rubber and cotton such as sand shoes, tennis shoes, etc., with cotton uppers and rubber soles, the required marking should be "cotton, rubber soles" (or as the case may be) and the country of origin, e.g. "England."

The marking need only be applied to one of each pair in a reasonably permanent manner, e.g. a label sewn to, or a brand on the inside of upper, or on the sole inside or outside.

In many instances the name and address of the maker is impressed on the outer portion of the rubber sole, and makers if so desired would simply need to add by impression to such address the words " cotton, rubber soles," or as the case may be.

Commerce Act—Marking on Rubber Boots or Goloshes.—In regard to rubber or gum boots or goloshes, the true description required to be marked on boots so described is either by a depressed mark on the article itself, or, as an alternative, by a rubber stamp, using indelible ink (preferably red, violet, or blue ink) on the inside of the article, e.g. on the sole, where it can be easily read.

DRUGGISTS' RUBBER SUNDRIES

As the manufacture of druggists' rubber goods and sundries in Australia is so far exceedingly limited in extent, a good market exists for these goods. In previous years German goods of this character entered largely into the trade.

It would be advisable for Canadian manufacturers of druggists' rubber sundries to recognize the fact that throughout Australia there exists an undoubted preference for English types or patterns.

EXPERT REPRESENTATION NECESSARY TO INTRODUCE NEW GOODS

In *Commercial Intelligence Journal* No. 969 (August 26, 1922) there appeared a comprehensive report upon Manufacturers' Agents in Australia, which clearly indicated how essential it was for Canadian manufacturers of rubber (and other) goods to make use of the service of expert, capable and reliable agents in endeavouring to introduce a new line of merchandise into these widely-spread markets.

In mining districts particularly, the personal element—i.e. the impression created by the representative of a new line—counts for more in obtaining orders than possibly in any other sphere of commercial activity in Australia. The business is extensive and the competition keen, hence it is a *sine qua non* to success that the representative introducing manufactures new to the district should be an experienced and capable traveller for the obvious reason that the line offered is frequently judged by the personality of the man identified with it.

As emphasized in former reports, Australian buyers are more conservative, as regards new makes of goods, than Canadian buyers, hence to introduce a new line, however estimable, requires patience and persistent effort.

The disposition of Australian buyers was never so strong as it is to-day to purchase their necessary oversea requirements within the Empire, and Canadian manufacturers are thus assured of sympathetic interest in their endeavours to obtain orders for their goods and products.

The mining districts throughout the Commonwealth are wide apart—situated in all the states—which make it necessary for a traveller to spend considerable time in the various territories to thoroughly cover the ground.

COMMONWEALTH CUSTOMS DUTIES ON RUBBER MANUFACTURES

For the information of Canadian manufacturers and exporters of rubber goods, the appended table, covering the Australian customs duties at present in operation, is submitted. It may be observed that so far the British preferential rates only apply to goods made in the United Kingdom, the intermediate duties are not yet applicable to importations from any country, while the

general tariff duties apply to all other countries, including Canada. As 10 per cent is added to the invoice values before the duties are computed thereon, the net duties are more than expressed in the tariff, hence in actual practice—in the general tariff schedule—the net duties work out as follows: 10 per cent = 11 per cent net; 15 per cent = 16½ per cent net; 35 per cent = 38½ per cent net; and 40 per cent = 44 per cent net on invoice values.

Tariff Items.	British Preferential Tariff.	Intermediate Tariff.	General Tariff.
326. Leather, Rubber, Canvas, and Composition Belting, and Green Hide for belting and other purposes ad val.	30 per cent.	35 per cent.	40 per cent.
327. (A) Slipper Forms and Piece Goods (Except Slipper Sole Felt) suitable for Boots, Shoes, and Slippers, as prescribed by Departmental By-laws....ad val.	Free	5 per cent.	15 per cent.
(B) Slipper Sole Felt..........................ad val.	20 per cent.	25 per cent.	35 per cent.
328. Goloshes, Rubber Sand Boots and Shoes and Plimsolls per pair	1s. 6d.	1s. 9d.	2s.
or ad val. whichever rate returns the higher duty	25 per cent.	30 per cent.	35 per cent.
329. Boots, Shoes, Slippers, Clogs, Pattens, and other footwear (of any material), n.e.i.; Boot and Shoe Uppers and Tops; Cork, Leather, or other Stocks or Soles n.e.i...ad val.	35 per cent.	40 per cent.	45 per cent.
330. Boots, Rubber, viz.:— Gum and Wading Boots....................ad val.	Free	5 per cent.	10 per cent.
331. Rubber and Rubber Manufactures, viz.:— Rubber, crude; Rubber Waste; Hard Rubber, in Sheets; Rubber Thread; Boot and Apparel Elastics; Masticated Rubber; Rubber, powdered or reclaimed..	Free	Free	Free
332. (A) Rubber Syringes, Enemas, Injection Bottles, Urinals, Air and Water Beds, Air Cushions and Pillows, and cut-sheet Surgical Tubing....ad val.	25 per cent.	30 per cent.	40 per cent.
(B) Rubber and other Hose; Rubber Manufactures, n.e.i., and Articles, n.e.i., in which rubber forms a part, including Bandages, Elastic Stockings, Leggings, Knee Caps, Thigh-pieces and Wristlets, Rubber Gloves, including Surgeons' Hat-makers' Press Bags and Rings, Gas Bags, Soles, Pads, and Heels, Cash Mats, Rubbered Tyre Fabric, Tyre Rubber, Photographic Accessories of Rubber not being integral parts of cameras; Cycle and Motor Car Repair Outfits.......................ad val.	25 per cent.	30 per cent.	40 per cent.
(C) Floor Coverings and Floor and Carriage Mats of Rubber...ad val.	25 per cent.	30 per cent.	40 per cent.
(D) Any article composed wholly or in part of a rubber substitute shall be charged at the rate to which the article would be liable if it were composed wholly or in part of rubber.			
333. (A) Pneumatic Rubber Tyres, and Tubes therefor, valved or unvalved—			
(1) Covers weighing each 2½ lb. or less; Tubes weighing each 1 lb. or less..........ad val.	25 per cent.	35 per cent.	40 per cent.
(2) Covers weighing each over 2½ lb.; Tubes weighing each over 1 lb.............per lb.	1s. 6d.	2s.	2s. 6d.
or ad val. whichever rate returns the higher duty	25 per cent.	35 per cent.	40 per cent.
(B) Rubber Tyres other than pneumatic, including compositions made up in form and size suitable for use with pneumatic tyre covers as a substitute for the inner tube.......................................ad val.	25 per cent.	35 per cent.	40 per cent.

IMPORTS OF RUBBER GOODS INTO AUSTRALIA

Particulars relating to the importations of rubber goods from the principal countries into the Commonwealth are submitted for the information of interested Canadian manufacturers as follows:—

According to Country of Origin	1919–20 Value £	1920–21 Value £	1921–22 Value £
Goloshes and Rubber Sand Boots and Shoes, and Plimsolls			
United Kingdom	11,147	56,572	25,835
Canada	72,161	103,069	22,667
United States	19,752	7,664	1,454
Total from all Countries	103,206	167,369	49,969
Gum and Wading Boots—			
United Kingdom	1,639	657	2,968
Canada	1,760	8,901	4,121
United States	2,377	3,049	2,160
Total from all Countries	5,776	12,638	9,261
Waterproof Cloth, prepared with Rubber, Oil or Celluloid Silk or containing Silk, but not containing Wool—			
United Kingdom	2,162	3,544	4,438
France	....	39	110
United States	250	104	74
Total	2,524	3,687	4,622
Woollen, or containing Wool—			
United Kingdom	1,252	4,497	2,566
United States	84	314	348
Total	1,336	4,811	2,914
N. E. I.—			
Australia	293	44	157
United Kingdom	46,073	149,411	61,177
Canada	262	2,896	7
Japan	76	361	130
United States	16,672	22,481	6,712
Total from all Countries	63,376	175,380	68,397
Rubber Manufactures, N.E.I., and Articles N.E.I., in which Rubber forms a part*—			
Australia	1,715	1,876	8,222
United Kingdom	182,226	338,024	271,123
Canada	6,688	4,959	3,196
New Zealand	40	26	133
France	739	1,059	893
Japan	5,453	2,898	907
United States	69,866	89,889	36,634
Total from all Countries	266,826	439,110	322,014
Rubber Tires and Tubes therefor, including Solid Tires—			
Australia	2,629	2,765	29,724
United Kingdom	70,851	170,526	67,502
Canada	304,430	243,289	86,019
New Zealand	42	21	501
Belgium	....	886	455
France	72,819	130,963	122,011
Italy	2,462	23,279	10,519
United States of America	431,262	652,129	269,656
Total from all Countries	884,590	1,224,328	586,457

* India-Rubber, Syringes, Enemas, Injection Bottles, Urinals; Air and Water Beds, Air Cushions and Pillows; Cut Sheet Surgical Tubing; Rubber and other Hose; Bandages, Elastic Stockings, Leggings, Knee-caps, Thigh-pieces and Wristlets; Floor and Carriage Mats; Hat-makers' Press Bags and Rings; Gas Bags; Soles, Pads and Heels, Cash Mats; Rubbered Tire Fabric; Tire Rubber; Rubber Stoppers or Corks; Photographic Accessories of Rubber not being integral parts of Cameras; Rubber Thread; and Boot and Apparel Elastics

IMPORTS OF RUBBER GOODS INTO AUSTRALIA—*Concluded*

According to Country of Origin	1919–20 Value £	1920–21 Value £	1921–22 Value £
Rubber, Crude, Powdered, or Reclaimed; Rubber Waste; Hard Rubber in Sheets; Masticated Rubber—			
United Kingdom	6,311	11,554	2,816
Ceylon	31,514	56,122	43,237
India	204	12.486	1,135
New Zealand	26	613	2,209
Pacific Islands—			
Bismarck Archipelago	2.259	....	....
Solomon Islands	174	1.607	28
Territory of New Guinea	....	3.716	2,222
Papua	34,154	34,367	5,820
Straits Settlements	49,458	120,076	153,908
Bolivia	14,076	....	....
Brazil	67,637	160,443	5,453
East Indies—			
Java	30.413	....	....
Netherlands East Indies	....	105,854	29,640
Peru	3,010	....	....
United States of America	1,166	3,658	1,006
Total from all Countries	240,876	511,232	247,964
Belting—Canvas and Composition—			
United Kingdom	59,935	98,627	51,933
Canada	1,441	44	2,545
United States of America	10,939	43,088	7,151
Total from all Countries	72,378	142,748	61,740
Belting—Leather—			
Australia	152	128	511
United Kingdom	6,283	12,223	5,886
Canada	137	341	53
Unieed States of America	3,642	4,170	2,462
Total from all Countries	10,214	16,904	8,976
Belting—Rubber—			
United Kingdom	2,950	4.971	1,453
Canada	1,136	9,043	3,630
United States	11,024	7,723	4,343
Total from all Countries	15,110	21,741	9,431

FOREST RESOURCES DEVELOPMENT IN BRITISH HONDURAS

The Legislative Council of British Honduras has decided to make provision for the development of the timber resources of the colony. A Forest Trust is to be created for the purpose; 50 per cent of the export tax on wood and chicle is to go towards the trust fund for the upkeep of an adequate foresting staff. As a result of negotiations which are proceeding, it is possible that the Government of Jamaica will purchase at least 2,000,000 feet of pine annually from British Honduras for the Government Railway and Public Works Departments. The colony is likely to supply immediately 10,000 hardwood sleepers to the Jamaica Railway.

SCOTTISH GROCERS', BAKERS', CONFECTIONERS' AND ALLIED TRADES' EXHIBITION

Mr. Gordon B. Johnson, Canadian Trade Commissioner in Glasgow, has forwarded a copy of the prospectus of the Third Grocers', Bakers', Confectioners' and Allied Trades' Exhibition which will be held in the Industrial Hall, Edinburgh, from September 12 to 26, 1923. The exhibition which was held last year was attended during its two weeks' run by about 200,000 persons. Exhibits are classified under the headings of foodstuffs, shop fittings, and miscellaneous. The charge for space will be 3s. 6d. per square foot, which space will include 4½-inch raised platform and signboard for name. For further information application should be made either to the Canadian Trade Commissioner in Glasgow or to the Managing Director, Edinburgh Exhibition Association, Limited, Industrial Hall, Annandale Street, Edinburgh.

GERMAN MARKET FOR APPLES

Trade Commissioner L. D. Wilgress

Hamburg, March 29, 1923.—The Hamburg market was formerly an important outlet for Canadian apples, especially Nova Scotia apples in barrels. In some seasons before the war as many as 500,000 barrels of Nova Scotia and Maine apples were imported for sale at the Hamburg fruit auctions. These auctions were very important, and fruit was sold not only for consumption in Germany, but also throughout Scandinavia and Russia, buyers from these countries attending in considerable numbers. In addition there was a good trade in boxed apples, chiefly from the states of Washington and California, up to about 200,000 boxes of apples being sold in certain seasons. An effort was being made to introduce boxed apples from British Columbia when the war intervened. A trial shipment of a few carloads was sent to Hamburg a few years before the war, and the results were reported to be fairly satisfactory.

IMPORTANT CENTRE OF DISTRIBUTION

The fruit auctions at Hamburg are the most important in Northern Europe on account of the excellent organization of the trade and the means of distribution. Coastal steamers sail regularly from Hamburg for all ports of the Baltic. Scandinavian and other buyers come to Hamburg in order to take advantage of the greater selection of fruit offered than is the case at their home centres. Since the war the distributing area of Hamburg has been enlarged, as Czecho-Slovakian and Austrian buyers now find it often more convenient to buy fruit through Hamburg instead of through Trieste as formerly. The trade at Hamburg is very well organized. The fruit is imported into the Free Port and is laid out for inspection in special fruit sheds. The auctions are held in a building a short distance away, so that buyers can proceed to the auction after having inspected the fruit.

CESSATION OF OVERSEAS APPLE TRADE

Unfortunately owing to the exchange situation in Germany, no apples from North America have been sold at the Hamburg auctions since the war. A few lots of boxed apples have been imported for the high-class hotel trade, but practically the only overseas apples sold by auction have been some consignments of Australian fruit, imported two years ago. Apples may be imported into Germany, but the importation of other fruit such as bananas, pineapples, and grapes is at present prohibited, so that oranges and lemons are the only overseas fruit now dealt in to any extent at the Hamburg auctions.

The depreciated exchange is the cause of the non-revival of apple shipments to Hamburg from North America. Germans can no longer afford to pay the prices required for imported apples. Home-grown apples have been selling in Germany at from 180 to 500 marks a pound. A barrel of Nova Scotia apples landed at Hamburg at $4 would, plus a duty of 60 cents, probably sell wholesale for $5.50, and retail at about $7. This at current rate of exchange is equivalent to about 1,100 marks a pound. The difference in price is too great to even attract the high-class hotel trade to pay more for the better quality of imported apples.

Another factor against the trade in imported apples during this season has been the excellent crop of apples all over the European Continent. Holland, Switzerland, and Austria formerly exported the bulk of their surplus apples to Germany, but being unable to sell to this country owing to the depreciated

exchange and good home crop, exporters in the countries mentioned are seeking an outlet in Scandinavia. Tyrolese apples are now being dealt in by Hamburg brokers for sale chiefly to Scandinavia. Owing to a good home crop, the Scandinavians have only recently commenced to import apples from other countries.

FUTURE PROSPECTS

The above is a brief review of the present situation in regard to the apple trade with Hamburg. The leading brokers were unable to express an opinion as to the future owing to the prevailing uncertainty and the confused political situation. It was thought, however, that next autumn there might possibly be an opening for a few consignments of Canadian apples in barrels with a view to the transit trade with Scandinavia. It would largely depend upon the results of the coming crops in Europe. Stabilization of the mark would undoubtedly eventually permit the importation of apples into Germany for local consumption, but no one can predict when this will be possible. A narrowing of the difference in price between German grown and imported apples might permit the importation of small lots of boxed apples for sale to the first-class hotel trade, even before the mark was definitely stabilized.

CUSTOMS DUTIES AND RESTRICTIONS

The duty on fresh unwrapped apples imported into Germany is 3.20 gold marks a 100 kg; 5 gold marks a 100 kg. for apples with paper wrapping, when imported from countries having a commercial treaty with Germany; otherwise 10 gold marks a 100 kg. for apples with or without paper wrapping. The duties are levied in paper marks at a certain percentage fixed regularly in accordance with the depreciation of the mark and the level of wholesale prices in Germany. At present the duties in paper marks are 5,094 times the rate in gold marks. Apples can be imported without an import license from the German authorities, but are subject to Government inspection before importation into the country.

MARKET REQUIREMENTS

Barrel apples have the largest sale on the Hamburg market, but there was also a good demand for boxed apples as indicated above. Only the best varieties of boxed apples were largely sold before the war owing to the high specific duty on apples in paper wrapping. California Newtons had less sale than Davis and Baldwins from the State of Washington. All varieties of Nova Scotia apples in barrels were imported before the war, especially Gravensteins, Baldwins, Kings, and Red Pippins. In Germany the home-grown Gravenstein is the popular favourite, and this is used as a basis for comparison with imported apples.

BASIS OF SALE

Apples were shipped to Hamburg before the war for sale on consignment at the auctions, which were held regularly. Most of the trade was handled by a few leading fruit brokers, who arranged for sale at the auctions on commission. The brokerage charge on imported fruit is now 8 per cent, but is fixed from time to time according to conditions. At the auctions, wholesalers in Germany, Scandinavia, Czecho-Slovakia, etc., are represented by buyers, the larger firms having usually two buyers at each auction. Canadian apples were usually imported during October, November, December, and January. The names of the leading German fruit brokers and importers have been forwarded to the Director, Commercial Intelligence Service, Ottawa. (Refer to File No. 26348.)

DRIED APPLES

Before the war there was also a large trade with Hamburg in dried apple rings. Ontario firms were able to secure a fair share of this business, and many thousand cases were shipped every season. Since the Armistice there has been little business done in imported dried apples for the same reasons as explained above in the case of the trade in fresh apples. At present dried apple rings from California cost $25 a case c.i.f. Hamburg. Apple rings dried from apples grown in South Germany have been largely sold in place of the imported, and as long as German apples are so much cheaper than apples from abroad, it is thought that no large trade in evaporated apples with Germany is possible. Some importers, however, stated that if the exchange rate remained stable it might be practicable to import apple rings next season. These goods were usually contracted for from June onwards for delivery from October onwards. Dried apple rings imported into Germany pay a duty of 4 gold marks a 100 kg.

CANNED APPLES

There was also a good trade with Germany before the war in canned apples, in which Canadian canners participated. Practically no importation is now taking place. Imports are only permitted under licenses, which are not freely granted. The high rate of duty—57 gold marks per 100 kg.—also tends to restrict the demand. There might later be a prospect for the importation of canned or gallon apples into Hamburg with a view to the transit trade, but importers were not very hopeful.

FIRST SHIPMENT OF CANADIAN STORE CATTLE TO GLASGOW

Trade Commissioner Gordon B. Johnson

Glasgow, April 6, 1923.—"Sweeping aside a slender red ribbon which was ostentatiously drawn across the gangway," in the words of the Glasgow *Herald*, "the first animal to land at Merklands Wharf yesterday from the first shipment of Canadian store cattle was the unconscious actor in a stage-managed piece of symbolism." Glasgow Corporation, as the owners of the foreign animals wharf, have been indefatigable protagonists against the embargo which came into existence in 1892, and those who waged the campaign—in some cases for thirty years—in its final and successful stage could not resist the temptation of having a tilt against what is described as Government red tape. A large representation of magistrates and councillors, and those interested in the cattle trade, attended at the wharf to witness the landing, which was followed by a civic luncheon in the banqueting hall of the City Chambers.

There were 221 cattle in this first shipment, and the first animal ashore was placed in the sale ring for the purpose of auctioning for the benefit of the Lord Provost of Glasgow's unemployed fund. By "snowballing," the bullock was ostensibly sold over and over again for prices ranging from 100 guineas to 1 guinea, until a total of £500 was reached.

The commercial auction of the cattle took place to-day, when the largest gathering that could be crowded into the sale ring room from all parts of Scotland, and the largest in the history of the place, was present. The animals were sold by three firms and the prices realized were as follows:—

100 head: average price £33 18s. 1d. Price per live hunderweight (112 pounds) 61s. 5d.
41 head: average price £31 1s. 9d. Price per live hundredweight (112 pounds) 61s. 10d.
80 head: average price £31 7s. Price per live hundredweight (112 pounds) 61s. 2d.

The highest price reached was for the first four sold, at £41. The lowest price was £26 5s.

The bidding was keen throughout, and one of the auctioneers, acting as agent for the Canadian sellers, expressed to the writer great satisfaction at the result of the sale.

The animals were in a more fat, forward condition, and for short keep, than is generally associated with "store" cattle, but that is accounted for, as Mr. Duncan Marshall, the special representative of the Canadian Department of Agriculture, stated, by the fact that nearly the whole shipment was from Ontario, where they have just completed a winter's stall feeding. The imports in large quantities will mainly be from Western Canada in the fall of the year, where they cannot be kept advantageously for winter feeding, but instead will fatten in the luxuriant pastures of Scotland and England.

A report on the market for Canadian store cattle appeared in *Commercial Intelligence Journal* No. 999, dated March 24, which showed in detail the requirements of this market. The only apprehension that exists here among the friends of the Canadian cattle trade is in regard to the continuity of supply. What, for instance, would happen if (say) the next administration of the United States takes off or modifies the present duty under the Fordney-McCumber tariff? Would the British market, in that case, be neglected? If that were to happen, the future of the trade with Great Britain would be in jeopardy. It is of the utmost importance that continuity of supply should be maintained.

FIRST CONSIGNMENT OF CANADIAN CATTLE AT MANCHESTER

Trade Commissioner J. E. Ray

Manchester, April 10, 1923.—The first consignment of Canadian cattle reached Manchester on April 5th in the *Manchester Division*. It had been expected that the boat bound for the Clyde, which had a good start over the *Manchester Division,* would be the first to arrive.

The cattle were in excellent condition on arrival and realized satisfactory prices, the highest being approximately £32, the lowest £20, and the average £26. Keen interest in the sales was shown, and the writer, who was present at the unloading and the sales, heard many eulogies of the quality of the steers. If no unforeseen obstacles arise it is safe to predict a good future for the cattle trade between Manchester and the Dominion.

Accommodation, etc.—The Salford Corporation is doing all in its power to attract Canadian cattle to Manchester, and the Manchester Liners, Ltd., and the Manchester Ship Canal authorities are doing everything possible to carry the cattle safely and expeditiously, and to accommodate them on arrival. The first-named body has issued an illustrated pamphlet for circulation among the cattle interests of Canada. A few paragraphs from the publication illustrate the capacity of the docks, lairage accommodation, marketing facilities, etc., and the efforts that are being put forth to attract the trade:—

Dock and Lairages.—The cattle boat is berthed at a special wharf frontage of 800 feet, with landing stage and three jetties, where the most approved, scientific and up-to-date facilities for landing cattle are provided. It is also a simple matter to lead the cattle at once into the Salford cattle market. At the landing wharf there is ample lairage accommodation for 1,900 cattle and 1,000 sheep at a time, and acres for further accommodation at call. The docks being adjacent to the cattle market have an important and good effect upon the condition of the cattle when offered for sale. Cattle walk direct from the boat into commodious lairages with fresh bedding down and plenty of good food and water. They rest quietly and are fed and cared for regularly until transferred to the Salford cattle market.

Salford Live Stock Cattle Market.—This greatest live stock market in Great Britain is in close proximity to the docks landing wharf, and in this market are obtained the best prices for beasts because here gather regularly the leading buyers from over 100 towns, and here are the men who govern the supply of meat to more than half the population of

the British Isles. There are regular sales. The Irish cattle sales are on Tuesdays, but special markets will be held for Canadian live stock to suit the disembarkation, and the sales will be frequent and widely advertised in the press.

Cattle Pens.—Salford market has over 300 specially built cattle pens and 1,000 sheep pens. There is first-class accommodation for 26,000 head at one time.

Slaughter Houses.—There are six up-to-date slaughter houses with all modern conveniences, two weighing machines, two weigh-bridges, and every conceivable facility for those connected with the cattle and allied trades, including the hide and skin dealers, all of whom have offices in the market precincts.

STATE OF THE COTTON TRADE IN LANCASHIRE

Trade Commissioner J. E. Ray

Manchester, April 9, 1923.—Six days ago there was put into operation by a Provisional Emergency Committee a scheme to check the sale of yarn at less than the cost of production. It was felt by the interests concerned in the cotton trade that unless this scheme were adopted, it was only a question of time before the entire industry would be carried on the current of depression to a point from which return to safety would be almost impossible.

It is realized that the cotton industry is facing a crisis more formidable than any that has confronted it during the last half century. Unfortunately, the cost of labour is nearly 100 per cent higher than it was in 1913, and taxation is six times heavier. These facts, taken in conjunction with the diminished purchasing power of overseas markets, will explain the present depressed condition of the cotton trade. Further, there seems to be no marked revival of Indian demand, on account of adverse economic conditions in the Peninsula, and the remarkable expansion of the production of the Indian mills.

Naturally the depressed state of Lancashire's staple industry is exercising an influence upon trade generally. When the cotton industry revives there will almost certainly be a revival of other industries.

UNITED STATES GRAIN FUTURE ACT DECLARED CONSTITUTIONAL

Frederick H. Palmer, Assistant Trade Commissioner in the United States

New York City, April 20, 1923.—The Grain Future Trading Act of the United States, passed September 21, 1922, purports to regulate interstate commerce and sales of grain for future delivery on boards of trade.

The primary purpose of the Grain Future Trading Act was to protect farmers and producers against alleged losses due to manipulation by grain market speculators. The law forbids future trading by non-growers of grain except on exchanges designated by the Secretary of Agriculture as " contract markets ". About the only condition for securing this designation not now practised by exchanges is admittance of agents of co-operative producing associations to privilege of membership, in order that the co-operative associations may get the benefit of the exchanges without paying a commission.

This law was attacked by the Chicago Board of Trade as being unconstitutional on the ground that it was a taxing statute. The Supreme Court, however, has sustained the validity of the Act as the " manipulation of the market for futures on the Chicago Board of Trade may, and from time to time does, directly burden and obstruct commerce between the states in grain, and that it recurs and is a constantly possible danger ".

Dealing in futures therefore takes on an interstate character, and " for this reason Congress has the power to provide the appropriate means adopted in this Act by which this abuse may be restrained and avoided."

This decision was announced at Washington on April 16 by the United States Supreme Court, when it rejected an appeal brought by the Chicago Board of Trade.

THE MAIL ORDER BUSINESS IN JAMAICA

F. L. Casserly, Office of Canadian Trade Commissioner

Kingston, March 10, 1923.—In recent years the mail order business in Jamaica has assumed very large proportions. To such an extent has this business developed that the new Post Office, built about eighteen months after the earthquake of 1907, is now much too small to cope with the volume of parcels which arrive every week, and the Government has been obliged to acquire another building to provide extra accommodation. According to the last report of the Postmaster for Jamaica, the quantities and values of the parcels received in 1921 (the latest period of record) were as follows:—

	Number of Parcels	Value
From United Kingdom	39,213	£100,479–13–7
From British West Indies	347	784—2–7
From United States	52,244	73,190–17–2
From Dominion of Canada	3,291	5,296—6–11
From Turks Island	41	59—1–9
From Canal Zone and Colon	3,886	2,672—0–0
From Bermuda	48	32—8–6
From British Honduras	105	68—0–9
Total	99,175	£182,582–11–3

On the above, the Jamaica Post Office collected duty to the value of £31,921 17s. 7d., while its share of the postage amounted to £1,623 16s. 8d. The returns for 1922 are not yet available, but it is probable that they will show an increase over the above figures, since financial and trade conditions were better in that year than in 1921.

DISTRIBUTION OF PARCELS

Parcels sent by mail to Jamaica are distributed in the ordinary manner, after examination by an official of the Post Office, and payment of the duty (if any) by the addressee. The Post Office accept as an invoice the usual form approved by the Postal Union, showing weight, contents and value, which must be affixed to each parcel before despatch at the other end. The duty is ordinarily paid on the declared value, but the Post Office reserve the right to exact payment of duty on its own valuation.

In addition there is a cash-on-delivery system, which at present is applicable only to parcels from the United Kingdom, and was instituted as an aid to the development of inter-Imperial trade. Under this system it is possible for a buyer in Jamaica to obtain goods from the mother country on payment of a deposit, the Post Office in Jamaica collecting the balance upon delivery of the parcel, and remitting the amount to the seller in England. Should the buyer fail to pay within fifteen days after being notified that there is a parcel awaiting him, the latter is returned. This facility, however, is not taken full advantage of by Jamaican purchasers; of the parcels received from the United Kingdom in 1921, only 9,197, representing a value of £22,851 16s. 1d.—or under 25 per cent of the total—were entered on the cash-on-delivery basis. At present, cash-on-delivery parcels cannot be sent from Canada to Jamaica, on account of the absence of an agreement upon the point by the Post Offices of the two countries, but the value of this method to Canadian exporters might be worth investigating.

FACTORS IN DEVELOPMENT

The two main reasons for the growth of this trade are the enterprise of British and United States export houses, and the high prices charged by

Jamaican retailers during and after the war. The British and United States catalogues which come into the island are exceedingly attractive in appearance, and contain very full information concerning the articles illustrated. With their flashy pictures and arresting descriptions, these catalogues appeal to the masses in a country like Jamaica, and are so simple as to be almost fool-proof. They answer every possible question which an intending purchaser might reasonably ask: for example, he can measure himself for almost any article of clothing, and feel certain that he will obtain an exact fit—just as his friends have done—from a supplier who, he believes, takes a personal interest in his needs, and will assuredly give him the best possible service. Also he knows to the nearest farthing just what his purchase will cost him, for the catalogues contain complete details of postage rates. The growth of the mail order business in Jamaica is a striking example of the adage "nothing succeeds like success", and the British and American houses which control the trade are well aware of this fact. They know that, especially in a small community like Jamaica, every successfully executed order is a more valuable advertisement than any newspaper or hoarding could afford; hence they have taken pains to develop organizations whose capacity for service is as nearly perfect as any human creation can possibly be.

As an example of the enterprise of such houses, a recent move by a Manchester exporting house might be instanced. This concern sent to some hundreds of persons in Jamaica booklets containing four coupons, each coupon to be sold for 1s. and to be returned by the buyer to the Manchester firm with a postal order for 4s. On the firm's receiving 16s. from four persons in Jamaica, the individual who sold the four coupons became entitled to choose one of a wide range of articles supplied by the firm; while each of the four persons who bought coupons and remitted 4s. received a book of coupons, and proceeded to repeat the process upon his friends. In this manner, considerable quantities of jewellery, articles of clothing, household requisites, etc., have been sold in Jamaica, and the island has been flooded with coupons. The main point of appeal—which is all-powerful with the Jamaican public—is that by selling the four coupons for 1s. each, one recovers the 4s. which he sent with the coupon previously sold him, and thus apparently obtains a present for nothing.

Direct importations through the mails received a considerable stimulus from the high prices demanded in Jamaica by retailers of almost every class of commodity during the war and the succeeding period of inflation. Rightly or wrongly, large sections of the population came to believe that they were being overcharged by the local stores; thus many people who had previously been accustomed to purchase locally their requirements of clothing and various kinds of personal furnishings turned their attention to mail-order houses in England and the United States, from which they could buy more cheaply; and although local retail prices have since fallen, the mail order habit is still firmly ingrained in the Jamaican purchasing public. The writer knows one person who, towards the end of 1920, was able to import shoes from England at a landed cost of about 35s. per pair. At that time, local retailers were charging about 60s. for a pair of similar shoes, and it is not surprising that this person has continued to import his footwear from England ever since. His case is typical of many.

PRINCIPAL ARTICLES IMPORTED

The basis of the mail-order business is of course the fact that in most instances one can by such means buy to greater advantage, either in price or in quality, than from retailers on the spot. Hence such importations cover a fairly wide range of goods, some idea of which may be gathered from the

following figures compiled by the Canadian Trade Commissioner from the records of the Jamaica Post Office:—

Number of Parcels Received During

	January, 1922			from	April, 1922		
	U.K.	U.S.A.	Canada		U.K.	U.S.A.	Canada
Textiles..	277	153	15	..	510	311	13
Clothing..	279	1,053	96	..	1,250	2,549	69
Boots and Shoes..	124	460	18	..	380	925	22
Pharmaceuticals..	50	139	7	..	334	190	6
Foodstuffs..	100	165	163	..	205	134	173
Confectionery..	15	121	11	..	123	170	26
Jewellery..	75	52	13	..	110	24	2
Hardware..	67	355	10	..	580	138	36
Stationery..	128	215	68	..	163	208	58
Miscellaneous..	135	645	44	..	410	771	78
Totals..	1,250	3,364	445	..	4,065	5,420	483

Total for January, 1922.. .. .. 5,059 parcels
Total for April, 1922.. .. .. 9,968 parcels

As such returns are not prepared by the Post Office, the above figures must be considered as only approximate; but in the opinion of that department they are a fair index of the different classes of goods imported. With regard to the disparity between the January and April figures, it should be noted that January, following on the heels of the Christmas season, is always a light month for parcels. Taken together, the two sets of figures are probably somewhat less than one-sixth of the total trade for 1922. The imports from Canada under the heading of foodstuffs consisted largely of yeast-cakes. The returns include a certain number of samples; this particularly applies to the parcels of confectionery from the United States.

CANADIAN BUSINESS CAPABLE OF INCREASE

It seems clear that Canadian firms could secure a larger share of this trade than at present, provided mail-order houses in the Dominion make a serious bid for it. There is only one way in which they can do this—namely, by falling in line with the methods of their British and American competitors, especially as regards the make-up of their catalogues. To this end, it is suggested that Canadian firms contemplating entry into the Jamaican market should obtain copies of the catalogues issued by well-known British and American houses, and should make these catalogues the object of special study. On application to the Department of Trade and Commerce, Ottawa (quoting File No. T.C.-4-110), they will be furnished with a list of about 500 representatives families with whom a start might be made. It would be advisable for a short printed circular setting forth the advantages of buying from Canada—*e.g.*, the lower rate of import duty in Jamaica—to accompany each catalogue; and great care should be taken that the correct postage is affixed. It is not an uncommon occurrence for mail matter to arrive here from Canada insufficiently stamped, and this would obviously be disastrous in the case of a preliminary issue of catalogues.

The writer has been informed by the Jamaica Post Office that the catalogues of a Canadian house exporting cheap jewellery have lately been arriving in increasing numbers, and from what can be gathered, the business of that concern is on the up-grade in the colony. There does not seem to be any good reason why this progress cannot be paralleled in regard to some of the other articles noted in the above analysis—for example, clothing and boots and shoes. The Jamaican duty on Canadian goods is 15 per cent ad valorem as

against 20 per cent on articles from the United States; this represents an advantage to Canada of about 1s. in the pound sterling. In so far as transportation is concerned, this does not present any difficulty, since Canadian parcels can always be routed via New York.

WHAT A CATALOGUE SHOULD CONTAIN

The following points on the information afforded to prospective purchasers by British and United States catalogues are given for the benefit of Canadian exporters desirous of entering this field.

The first six or seven pages of such catalogues are usually devoted to detailed directions (often printed in Spanish as well as English, in parallel columns) on the method of sending orders and all cognate matters. Some of the principal points covered are the following: How to write your order; shipping instructions; how to send money; the cash-in-delivery system (not at present applicable between Canada and Jamaica); terms to business houses and persons in trade; substitutions; return of unsatisfactory goods; change of address; sending of samples; transfer of accounts; tables of weights, measures, parcels post and insurance charges; loss and damage claims. Throughout these particulars, which are given in the fullest possible detail, and are attractively displayed with appropriate sub-heads, runs the note of personal appeal to the prospective buyer; thus one paragraph is headed "You Always Get Our Lowest Prices," and another, "We Save You Money on Freight Charges." At the back of the catalogue are to be found several blank order-forms, showing, in tabulated form, catalogue number, quantity or amount, name of article desired, sizes, colours, finish, etc., and price; also name and address of the sender, and shipping instructions. All the buyer has to do is to fill in this form, attach the proper amount of money, and post it to the mail-order house on the other side; he is saved the trouble of writing a letter.

DAIRY MACHINERY FOR THE CO-OPERATIVE ASSOCIATIONS, LATVIA

The co-operative movement among farmers in Latvia, says *Kelly's Monthly Trade Review*, has always been encouraged by large estate owners. These societies purchase all their members' requirements of machinery, etc., direct from the manufacturers, as a rule at very cut prices; but there are many farmers, of course, who purchase independently of these organizations, and therefore are customers worth cultivating. The "Central Society of Latvian Dairies" (of 87 Muhlenstrasse, Riga) has a membership of 105 co-operative societies, many of which consist of several hundred dairies, and it will therefore be easily seen that the consumption of machinery, accessories, fertilizers, oilcakes, salt, etc., must be considerable. The "Economic Society of Latvian Farmers" (of 68 Muhlenstrasse, Riga) is another important concern, working hand in hand with the Central Society; and another even more important organization, also under society rules, is the "Central Society of Consumers" (of 27 Konigstrasse). The total number of cows kept for dairy purposes belonging to these members is probably around about 300,000. Just now very sharp competition is offered by the new "Krupp Dairy Machinery Department," which turns out cream separtors of a capacity from 120 up to 2,000 litres; but the manufacturers in the neighbouring countries—Sweden, Finland and Denmark—are wel equipped to look after Latvia's requirements.

INTERNATIONAL AGRICULTURAL AND INDUSTRIAL EXHIBITION AT RIGA

With a view to developing trade and establishing connections abroad, the Third International Agricultural and Industrial Exhibition will be held in Riga from July 22 to August 5 next. In order to facilitate the participation of foreign firms, all articles will be allowed to be imported free of Customs duty, such duty being levied only on exhibits which are eventually sold. Persons proceeding to Latvia either as exhibitors or as the latters' representatives have to pay only one-fifth of the ordinary visa fee—*i.e.*, 4s.

TARIFF CHANGES AND CUSTOMS REGULATIONS

Summary of Irish Free State's Tariff Arrangements

Trade Commissioner Harrison Watson

London, April 13, 1923.—On the 1st of April the Irish Free State Government took over from the Imperial authorities the Customs Service operating within its boundaries, and thereupon became a separate entity, administering its own tariff and customs law.

In view of the fact that Great Britain, on account of her superior shipping facilities, conducts an important entrepot trade with Ireland, and exports from Canada to the Free State will doubtless largely continue to pass through this country en route, it seems interesting to submit the following résumé of the position under the new regime which has been supplied by an official of H. M. Customs in London:

" To put it in a nutshell, the position with regard to trade between Great Britain or Northern Ireland and the Free State is precisely the same as with regard to trade with, say, Canada. Dutiable goods imported into Great Britain or Northern Ireland may be deposited in bonded warehouse and re-exported from bond without paying duty at all. Further, in all cases where the law provides for payment of a drawback on exportation, goods which have been duty paid on their importation from overseas may be exported to the Free State on drawback. Goods imported from overseas may of course also be entered for passage through Great Britain and for Northern Ireland to the Free State under bond."

The schedule of drawbacks payable in respect to goods on which import duty has been paid upon entry into Great Britain and which are subsequently re-exported, is given in the British Customs Tariff, and the rates applicable to any particular article may be obtained from the Department of Trade and Commerce, Ottawa.

In the reverse direction, i.e. dutiable goods brought into the Irish Free State and thence shipped to the United Kingdom, there is practically no alteration in the above conditions, because the Government has virtually adopted the British Customs law and procedure, as well as the British Customs and Excise Tariff, any differences being of a minor character. A copy of the Irish Tariff is also on file at the Department of Trade and Commerce, Ottawa. It is not probable that much traffic from Canada to Great Britain will be routed through the Free State, but for purposes of uniformity the following statement has been secured from the Irish authorities, showing the various methods by which the payment of double duty may be avoided:

"When dutiable goods are landed first in the Irish Free State for re-export to Great Britain, the following courses are open:—

"(1) The goods may be dealt with under the transit regulations, which involve no payment of duty.

"(2) The goods may be deposited in approved warehouses in the Irish Free State and exported therefrom to Great Britain without payment of duty.

"(3) If the goods are eligible for drawback, a drawback corresponding to the duty may be paid on exportation."

The Irish Customs Tariff contains the schedule of drawbacks allowable.

Revised Customs Duties of the Union of South Africa

The British Board of Trade have received telegraphic information from H.M. Trade Commissioner in Cape Town to the effect that the South African budget proposes to double the import duties on condensed milk and carbide of calcium and provides, inter alia, for the following revised duties on the undermentioned articles:—

Articles	Import Duty under the General Tariff provided for in the Budget.
Paints, glass bottles, asbestos sheets, slates, sheet metal printed, embossed	25 per cent. ad val.
Detonators, sheet metal, enamelled, acetylene lamps	20 per cent. ad val.
Boots	30 per cent. ad val.
Confectionery	3½d. per lb. (or 30 per cent. ad val., whichever is greater).
Wheat flour	3s. 3d. per 100 lbs.
Matches, wooden: in boxes of not more than 100 matches	2s. 6d. per gross of boxes.
In boxes containing more than 100, but not more than 200 matches	5s. per gross of boxes.
Golden Syrup	7s. per 100 lbs.
Rubber tires, solid	3d. per lb.
Pneumatic	1s. per lb.
Motor car tubes	8d. per lb.

The telegram states that there has been no increase in the preferential rebates accorded to goods the growth, produce, or manufacture of the United Kingdom and of reciprocating British colonies.

United States Tariff Investigations

FREDERICK H. PALMER, ASSISTANT TRADE COMMISSIONER IN THE UNITED STATES

New York City, April 20, 1923.—As pointed out in the report on the present Tariff Act of the United States at the time of its enactment (*Commercial Intelligence Journal* No. 974: September 30, 1922), one of its most unusual features was contained in the provision empowering the President, under certain conditions, to change the rates of duty provided in the Act. One of the conditions stipulated is that of proven differences in costs of production.

Complaints in this regard have been received by the United States Tariff Commission, which is charged with assisting the President in the exercise of his discretionary powers. On March 27, 1923, acting on these complaints, the Tariff Commission ordered investigations into relative costs of production of seventeen commodities with a view to possible recommendation of changes in the present duties.

These investigations will be carried out under authority of section 315 of the Tariff Act, and if it be proven that the duties now levied do not equal the differences in costs of production in the United States and in the principal competing country, the President is empowered to change classifications and to increase or to decrease the rates of duty within a range of 50 per cent. It is further provided, in the case of goods subject to ad valorem duties when such an advance in the rate of duty will not equalize the difference in the costs of pro-

duction, that the President may order the duty to be assessed upon the American instead of the usual foreign valuation.

Consequently there is now the possibility of the import duties for particular commodities, as enumerated in the Tariff Act of 1923, being modified.

To date the United States Tariff Commission has ordered investigations of the differences in costs of production, etc., with respect to:—

Oxalic acid.
Barium dioxide.
Logwood extract.
Sodium nitrate.
Pig iron.
Paint brush handles.
Cotton warp—knit fabric.
Cotton hosiery for infants.
Diethyl barbituric acid and derivative thereof.
Casein.
Potassium chlorate.
Mirror plates.
Swiss pattern files.
Sugar.
Cotton gloves made of warp-knit fabric.
Wall pockets.

Artificial or ornamental fruits, vegetables, grains, leaves, flowers, and stems or parts thereof.

United States Anti-Dumping Order: Veneer from Province of Quebec

Mr. F. H. Palmer, Assistant Trade Commissioner in the United States, writes that on April 18 an anti-dumping order was issued by Assistant Secretary of the Treasury Moss involving imports of veneers or thin lumber.

The order recites the section of the tariff law which permits the imposition of additional duties when imported merchandise is being sold at less than its fair value as a means of injuring a domestic industry.

"After due investigation," says Mr. Moss in the order, "I find that the industry of manufacturing veneers or thin lumber in the United States is being or is likely to be injured, by reason of the importation into the United States of veneers or thin lumber imported from the province of Quebec, Canada, and that such merchandise is sold or likely to be sold in the United States at less than its fair value."

Under the law collectors of customs upon the issuance of an order of this character are empowered to assess the anti-dumping duties as provided by law.

United States Regulations Regarding Marketing Containers with True Name of Meat or Product Contained Therein

Circular letter No. 1164 of the Bureau of Animal Industry, United States Department of Agriculture, with respect to meat inspection reads in part as follows:—

Immediate or true containers shall bear the true name of the meat or product contained therein. It should be observed that a coined or fanciful name, which does not in itself serve to identify the product to which it is applied, will not in future be acceptable as the true name of the product within the meaning of the regulation cited. Illustrations of such a name may be found in the terms "Camping Delight," "Luncheon Spread," "Breakfast Tasties," "Noontime Relish," "Luncheon," etc. However, no exception will be offered to such a name when preceded by a qualification indicating the character of the product, such as "Pork Camping Delight," etc., or the application of the coined name immediately followed by a prominent statement of ingredients arranged in the order of their percentages. In the absence of either of these qualifications the coined name should be accompanied by the statement "a meat food product" or a similar acceptable statement.

By reason of long and common usage certain terms such as "Cooked Specialty" and "Minced Roll" have become generic or well established trade names. Therefore no objection is offered to the use of these terms without qualification as true names of products prepared as heretofore, without the addition of cereal, similar substances, or excessive water. The term "Baked Loaf" or similar term is regarded as a true name of a product to which it is properly applicable.

In a number of instances cloth bags bearing unqualified names of the character referred to in the first paragraph of this letter, and containing chopped or comminuted products, have been approved in the absence of a specific classification which would serve to differentiate between such coined names and generic or established trade names referred to in the second paragraph of this letter. Supplies of approved containers on hand bearing such coined names,

and which in other respects conform to existing requirements, will be permitted to be used pending the submission of information as to the approval number of such bags, the quantity on hand and the length of time it will take to exhaust the supply. Before new supplies are prepared sketches or proofs prepared in conformity with the requirements outlined should be submitted for approval.

The foregoing ruling does not apply to meat products in animal casings or to compounds, which are otherwise provided for.

Trade Control and Tariffs in Germany (Occupied Territory)

The following summary of the regulations concerning Trade Control and Tariffs at present in force in the Occupied Territory of Germany has been drawn up in the British Board of Trade for general information, and was issued on April 6, 1923:—

A. IMPORTS.

(1) With the exceptions mentioned in paragraphs 2 and 3, goods consigned to places within the occupied territory of Germany by way of the western frontier or the Rhine must be covered by an import license issued by one of the three license-issuing offices which are now functioning under Allied control, viz:—

(*a*) At *Bad Ems,* for imports into the territory occupied under the Rhineland agreement;
(*b*) At *Dusseldorf,* for the area occupied under the sanctions of March, 1921;
(*c*) At *Essen,* for the recently Occupied Territory (Ruhr).

(2) Import licenses are *not* required for goods which were exempt from import license requirement under the German regulations in force before the French advance into the Ruhr. The list of exempted goods consists very largely of raw materials. Applications for import licenses must be made to the respective offices, according to the place of destination of the goods, by firms established and registered in the Occupied Territory; and consignments of goods of any kind which require an import license should not be dispatched from the exporting country until the exporter has assured himself that a license has been obtained. The license fee payable is 1 per mille ad valorem.

(3) Foreign coal and coke consigned to places in the Occupied Territory must be covered by an import license issued by the Coal Committee, Inter-Allied Rhineland High Commission, Coblenz. Licenses are delivered free of charge. The Coal Committee does not deal with applications for licenses in respect of pitch and other coal by-products. These goods are dealt with by the offices mentioned in paragraph 1.

(4) Goods consigned to places within the Occupied Territory by way of the Western frontier of the Rhine are, as from 25th March, 1923, subject to import duty at the rates of duty prescribed by the German Customs Tariff in the form in which it stood in April, 1922. This treatment applies to all goods cleared through Customs Houses in the Occupied Territory on and after 25th March. (Before that date an import duty of 10 per cent ad valorem was in force, as a temporary measure.) Import duty has to be paid to the officials of the Franco-Belgian Customs organization (which has superseded the German Customs organization) at one or other of the Customs stations on the Rhine and the western frontier which are at present open for the clearance of imported goods, in accordance with the regulations issued by the Franco-Belgian authorities. *Alcohol* which, under German law, is a Government monopoly, is subject to special duties (import duty and *droits compensateurs*) on import into the Occupied Territory by way of the Western frontier or the Rhine.

(5) Should it happen that dutiable goods are consigned to a place in Occupied Territory via unoccupied Germany, import duty on the goods is not charged in Occupied Territory if a certificate of origin and a receipt for payment of duty, issued by the German Customs in unoccupied Germany, is produced to the Franco-Belgian Customs administration in Occupied Territory, provided, however, that it appears that this route was not chosen in order to evade payment of duty to the occupying powers.

(6) Goods the produce of, and consigned from, the United Kingdom to Cologne and other places in the British zone of occupation by way of the western frontier or the Rhine must, as in the case of merchandise consigned to places outside the British zone, be covered by an Allied import license, and duty will be paid on such goods at a Custom House under Franco-Belgian administration before they arrive in the British Zone. On arrival at destination, the German Customs officials* in the British Zone will not demand the production of German import licenses or the payment of any import duty in addition to that already paid to the Franco-Belgian Customs.

* The German Customs Administration has been superseded everywhere in the occupied areas except in the British Zone, where it continues to function.

B. EXPORTS

(i) *To Destinations other than Unoccupied Germany.*

(7) With the exceptions mentioned in paragraphs 8 and 9, goods to be exported to countries other than Germany from places within the Occupied Territory of Germany, by way of the Western frontier or the Rhine, must be covered by an export license issued by one of the three license-issuing offices which are now functioning under Allied control, viz:—

(*a*) At *Bad Ems*, for exports from the territory occupied under the Rhineland agreement;
(*b*) At *Dusseldorf*, for the area occupied under the sanctions of March, 1921;
(*c*) At *Essen*, for the recently Occupied Territory (Ruhr).

(8) Export licenses are *not* required for goods which were exempt from export license requirement under the German regulations in force before the French advance into the Ruhr. Applications for export licenses must be made to the respective offices, according to the place of export of the goods, by firms established and registered in the Occupied Territory and consignments of goods of any kind which require an export license will not be allowed to leave the Occupied Territory except under cover of such license.

(9) German coal and coke to be exported abroad from places in the Occupied Territory must be covered by an export license issued by the Coal Committee, Inter-Allied Rhineland High Commission, Coblenz. Licenses will be granted only in exceptional cases, and the applicant must be a producer of coal. The issue of licenses, when granted, is free of tax and duty. The Coal Committee does not deal with pitch and other coal by-products.

For dyes originating from factories in the Occupied Territory and delivered to Great Britain by way of reparation, export licenses are issued automatically and without charge.

(10) The issue of export licenses for goods other than coal and "reparation" dyes is subject to the following conditions:—

(*a*) Payment of a license fee of 3 per mille ad valorem;
(*b*) Payment of an export duty of 10 per cent ad valorem (4 per cent in the case of mineral waters and oilseed cake; shellac being free of export duty), which payment must be effected in the currency stipulated on the license (goods free of export license requirement are exempt from export duty);
(*c*) The exporter must enter into a formal undertaking to deposit, to the account of the *Comité spécial de la Comptabilité générale de la Haute-Commission*, the prescribed proportion of the foreign valuta to be received in payment for the goods exported. Such deposit is reimbursed to the person concerned by payment to him of an equivalent sum in paper marks at a rate fixed by the above-mentioned Committee.

[*It is understood that arrangements are being made for the reintroduction in Occupied Territory of the German Export Tariff.*]

(11) The price of goods in respect of which an export license is sought must be expressed in "appreciated" foreign currency ("en devises étrangères appréciées"). "Mark" prices will only be recognized by way of exception. "Minimum export price" conditions continue to be enforced.

(12) Goods consigned from the Occupied Territory to a country other than Germany, by way of non-occupied Germany, require an export license, but are exempt from export duty in the Occupied Territory except in cases where it is established that the goods are being diverted from the normal route for the purpose of evading the duties and obligations imposed by the Allied authorities.

(13) For goods to be exported from Cologne and other places in the British Zone of occupation to the United Kingdom, a German export license will not have to be produced to the German Customs officials in the British Zone,† nor will any export duty on such goods be claimed by the German Customs officials in the Zone. If the merchandise is of a kind which requires an export license, the license must be obtained from the competent Allied licensing officer (see paragraph 7), and the license fee and the export duty will be payable to the Allied authorities as a condition of the issue of the license.

(14) (*a*) *Certain facilities have been granted by the Franco-Belgian authorities in the Occupied Territory in respect of the export of goods from that territory, on account of foreign traders, the orders for which were placed before 1st February, 1923.*

British traders who desire to secure the delivery of goods which they ordered from firms in the Occupied Territory before the date mentioned should furnish (if this has not already been done) either direct or through the Board of Trade full details of the transaction to the British High Commissioner, Inter-Allied Rhineland High Commission, Coblenz, viz: description of the goods and quantity thereof (including, if possible, net weight and

† The German Customs Administration continues to function in the British Zone, but not elsewhere in the Occupied Areas.

gross weight and nature of packing), sale price, name and address of supplier in the Occupied Territory, name and address of purchaser, date of order or contract, agreed date of delivery of goods, and a statement whether or not payment in whole or in part has already been effected; these details should be accompanied, if possible, by any available evidence as to actual date of order (e.g. the original contract or copy thereof), and a statement of any special considerations which make the delivery of the goods a matter of urgency or importance. In cases of this kind which, after investigation, are endorsed by the British High Commissioner and transmitted by him to the competent Licensing Office, the exportation of the goods from the Occupied Territory will be conditional upon payment of export duty at the rate in force at the date of the order (instead of 10 per cent ad valorem), and there will be no necessity for the supplier of the goods to apply for an Allied export license. If the supplier refuses to pay the export duty at the old rate to the Franco-Belgian Administration, the purchaser may pay such duty, and endeavour to come to an arrangement with the supplier for a corresponding readjustment of the purchase price. In all approved cases of this kind, the purchaser of the goods will be exempted from the obligation of depositing foreign valuta in respect of the goods (cf. paragraph 10 (*c*)).

(14) (*b*) For goods loaded (expediées) in the Occupied Territory in destination for places abroad before 20th February, 1923, and covered by a regular export license, no further license or further payment of export duty is required, provided that the export duty in force at the time of the issue of the license has already been paid, whether to the Franco-Belgian Administration or to the German officials.

(14) (*c*) Licenses regularly issued before 25th January by the License Office at Bad Ems (for the left bank of the Rhine and the Dusseldorf and Duisburg bridgeheads), or before 14th February (for the Occupied Territory of the Ruhr) are recognized as valid for a period of three months from the date of issue if they are submitted for restamping (which is done free of charge); the export tax is to be paid at the rate prescribed by the German Export Duties Tariff in force at date of issue of license (instead of the new rate of 10 per cent ad valorem). The export tax is to be paid to the Allied authorities, so far as it had not already been paid to the German authorities on any portion of the goods covered by the license which had previously been exported. The exporter is to undertake to place at the disposal of the Allied authorities a percentage of the foreign valuta received as the sale price of the goods, such percentage to be calculated according to the German regulations in force on 25th January. The foreign valuta is to be refunded to the person concerned by payment of a corresponding sum in paper marks. As regards the Ruhr territory, however, if the contracts are not sufficiently definite or are not definitely dated prior to 11th January, the license will be restamped only after investigation, and for quantities of goods *at most* equal to the average monthly export effected by the interested party to the destination concerned in the course of the second six months of 1922.

(ii) *To Unoccupied Germany*

(15) The export of goods from both the old and new Occupied Territory to non-occupied Germany is forbidden without a special permit. The export of certain products, such as raw and semi-finished iron and steel goods, machinery, coal, coal-tar products and chemical manures, etc., to unoccupied Germany is absolutely forbidden and only in exceptional cases will permits be granted. For other products permits should be obtained from certain offices which have been established for this purpose at Crefeld, Cologne, Mainz, and Ludwigshafen. The granting of such permits is conditional upon the payment to the office granting the permit of an export duty, which has been provisionally fixed at 10 per cent ad valorem, except for oleaginous seeds (1 per cent), exotic spices (5 per cent), and marble (4 per cent). Goods of foreign origin which have been imported into the Occupied Territory will, in principle, be entitled to permits authorizing exportation to unoccupied Germany.

C. TRANSIT THROUGH OCCUPIED TERRITORY

(16) Goods consigned from a country other than Germany by way of the Occupied Territories to a country other than Germany enjoy the usual transit facilities, i.e., they are exempt from duty both on entry into and departure, from the Occupied Territory, if the transit regulations are complied with.

(17) Goods consigned from a country other than Germany through the Occupied Territory, either by way of the Western frontier or of the Rhine, to non-occupied Germany must pay import duty at the first office in the Occupied Territory competent to collect such duty, as if the goods were consigned to the Occupied Territory. (Goods free of import duty according to the German Tariff of April, 1922, are, of course, exempt from tax.) There is no further duty on the exit of such goods from the Occupied Territory, and no Allied licenses are reuired for such goods. According to the regulations adopted by the High Commission on 1st March, foreign coal is allowed free transit through Occupied Territory in destination to unoccupied Germany provided that the usual transit rules are observed and that the cargo remains, during the transit, under the control of the Allied

Customs officials. The occupying military forces may requisition any class of coal they choose, to cover their own requirements, but otherwise there should be no interference with transit coal.

Special attention is drawn to the fact that for coal in transit through Occupied Territory to unoccupied Germany, a German import license must be produced to the Franco-Belgian Customs officials in Occupied Territory, failing which delays and difficulties are likely to arise.

(18) Goods consigned from non-occupied Germany in transit through the Occupied Territory to a country other than Germany pay export duty in the Occupied Territory; no Allied licenses are required for such goods. Transit goods covered by German export licenses issued before 25th January pay export duty at the rate fixed by the German regulations and indicated at the back of the license. The general export duty of 10 per cent ad valorem is payable in respect of goods covered by German export licenses issued on and after 25th January, on goods not accompanied by German export license. Goods passing in transit through Occupied Territory and dispatched from unoccupied Germany before 21st January, on which export duty had already been paid, are exempt from further payment and formalities in the Occupied Territory. A similar concession is granted in respect of such "transit" goods dispatched from unoccupied Germany between 21st January and 1st February, if the goods were already paid for by the purchaser and belonged to him at the date of dispatch from unoccupied Germany.

Note.—The British High Commissioner at Coblenz reports that it has been decided to exempt goods consigned from non-occupied Germany in transit through the Occupied Territory to a country other than Germany from payment of export duty in the Occupied Territory. *This decision is to take effect as from the 10th April.* The Franco-Belgian Customs authorities in Occupied Territory will require, as a condition of this facility, to be furnished with proof that export duty has already been paid on the goods in unoccupied Germany.

STEAMSHIP SERVICE BETWEEN THE RIVER PLATE-MONTREAL

Messrs McLean Kennedy Limited, Coristine Building, Montreal, agents for the Houston Line, announce that the ss. *Hilarius* will load on berth at Buenos Aires and other River Plate Ports for Montreal direct, during the first part of May, arriving early in June.

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain.	†*Mauretania*	New York	May 8
" " "	:*Minnedosa*	Montreal	" 9
" " "	†*Minnekahda*	New York	" 10
" " "	*Montrose*	Montreal	" 11
" " "	:*Empress of Scotland*	Quebec	" 12
" " "	*Regina*	Montreal	" 12
" " "	†*Berengaria*	New York	" 15
" " "	†*Paris*	New York	" 16
" " "	*Montlaurier*	Quebec	" 18
" " "	*Megantic*	Montreal	" 19
Ireland only	‡*Marvale*	Montreal	" 10
France	**Andania*	Montreal	" 19
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela	*Chaudiere*	Halifax	" 11
Union of South Africa	**Benguela*	Montreal	" 15
Bermuda, Bahamas, Jamaica, Colombia, British Honduras	**Can. Fisher*	Montreal	" 24
Cuba, Jamaica, and Colombia	**Ottar*	Halifax	" 10
Argentine Republic	**Hesperia*	Montreal	" 20
China and Japan	*Philoctetes*	Victoria	" 10
" " "	*President Jackson*	Victoria	" 14
" " "	*Empress of Russia*	Vancouver	" 17
Australia and New Zealand	‡*Tahiti*	San Francisco	" 18
Australia only	‡*Ventura*	San Francisco	" 29

† Letter mail only. * Parcel post and specially addressed correspondence only.

‡ Letter and Paper mail only - Papers, Parcel Post and specially addressed correspondence only.

: The *Minnedosa* and *Empress of Scotland* will also be used for direct mail for the Continent including direct Parcel Post to France.

The *Barracoo* published in last week's Notice is cancelled.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING APRIL 24, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement of the nominal closing quotations for all the principal exchanges for the week ending April 24, 1923. Those for the week ending April 17 are also given for the sake of comparison.

		Parity	Week ending April 17, 1923	Week ending April 24, 1923
Britain .. ..£	1.00	$4.86	4.7570	4.7341
France .. ..Fr.	1.	.193	.0670	.0687
Italy .. ..Lire	1.	.193	.0500	.0504
Holland .. ..Florin	1.	.402	.3993	.3987
Belgium .. ..Fr.	1.	.193	.0578	.0596
Spain .. ..Pes.	1.	.193	.1568	.1564
Portugal .. ..Esc.	1.	1.08	.0484	.0458
Switzerland.. .. .. Fr.	1.	.193	.1847	.1855
Germany .. .. Mk.	1.	.238	.000045	.000033
Greece .. .. Dr.	1.	.193	.0122	.0127
Norway .. .. Kr.	1.	.268	.1823	.1809
Sweden .. ..Kr.	1.	.268	.2713	.2723
Denmark .. .. Kr.	1.	.168	.1922	.1922
Japan .. ..Yen	1.	.498	.4957	.4961
India .. .. R.	1.	2s.	.3213	.3209
United States .. ..$	1.	$1.00	1.0200	1.0187
Mexico .. ..$	1.	.498	.4957	.4951
Argentina .. ..Pes.	1.	.424	.3738	.3731
Brazil .. .. Mil.	1.	.324	.1122	.1107
Roumania .. .. Lei	1.	.198	....	....
Jamaica .. ..£	1.	4.86	4.7570	$47341
British Guiana .. ..$	1.	1.		
Barbados .. ..$	1.	1.		
Trinidad .. ..$	1.	1.		
Dominica.. .. ..$	1.	1.		
Grenada .. ..$	1.	1.	.9855—.9951	.9837—.9843
St. Kitts .. ..$	1.	1.		
St. Lucia.. .. ..$	1.	1.		
St. Vincent .. ..$	1.	1.		
Tobago .. ..$	1.	1.		
Shanghai, China .. ..Tael	1.	.708	.7624	.7687
Batavia, Java .. .. Guilder	1.	.402	.3927	.3960
Singapore, Straits Settlements .. $	1.	.567	.5661	.5654

LABOUR COSTS A PROBLEM OF JAPANESE INDUSTRIALISTS

Since Japan's ability to compete in foreign markets depends to a considerable extent upon the low production costs, the present high wage scale is a matter of concern to the industrialists and to the nation as a whole, says the United States *Commerce Reports*.

While the wage tendency is downward, reductions have been unimportant. It is obvious that no great progress can be expected in this direction so long as the cost of living remains at its present high level, and the tendency has been upward since the first of the year. The cost of living in Japan to-day is over 100 per cent higher than before the war, and 150 per cent more than in 1900.

During January wages ranged from an average of 1.4 yen per day (1 yen =$0.4985) for textile workers to 4.45 yen per day for machine workers. The building trades, which include carpenters, bricklayers, stonemasons, and plasterers, are the second highest paid, the average wage being 3.8 yen per day Compared with American wage scales, these figures seem low, but when contrasted with Japan's pre-war wages they are abnormally high. The relative efficiency of the Japanese workman is also a factor of importance.

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Quebec, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1529. Cereals.—A firm in Genoa, Italy, are desirous of securing grain, wheat, maize and oats. They are particularly interested in Nos. 1 and 2 Manitoba Dominion Inspection, Nos. 1 and 2 Amber Durum Inspection, and Mixed Durum No. 2.

1530. Flour.—A responsible firm of commission merchants and importers in Tampico, Tamaulipas, Mexico, desire to secure the agency for an important Canadian flour mill. Correspondence in English.

1531. Potatoes.—A foreign import house in Kobe, Japan, who have considerable orders for potatoes, are interested in receiving quotations on same from Canadian exporters. Correspondence regarding this subject is requested immediately as the possibilities for business look good, providing Canadian prices are not too high.

1532. Whole and Boneless Dried Cod.—A firm in Buenos Aires desire to be placed in touch with exporters of whole and boneless dried cod.

1533. Lobster, Principally Coming from Nova Scotia and New Brunswick.—A responsible French firm want the sole agency for a Canadian firm able to export good quality lobster.

1534. Canned Goods.—A Birmingham importer is prepared to handle consignments of all canned goods.

1535. Dried Milk.—A Bristol firm of importers, with branches in Liverpool and London, desire the United Kingdom agency for Canadian manufacturers of dried milk, manufactured by the spray process.

Miscellaneous

1536. Woollen Yarns.—A responsible Japanese import and export house write that they are very much interested in the import of Canadian yarns, both for handling knitting and hosiery, and will be obliged if any Canadian firm in a position to attend to their requirements will send them samples and prices.

1537. Woollen Yarns.—An importer in Osaka, Japan, would be glad to receive samples of woollen yarns from Canadian manufacturers, accompanied by prices c.i.f. Japan.

1538. Woollen Yarns.—A large and responsible Japanese house desire to be brought in touch with Canadian spinners who are in a position to supply them with samples and quotations of hosiery, weaving and knitting yarn. Full particulars regarding prices and quantities available.

1539. Woollen Yarn.—A merchant in Osaka, Japan, specializing in woollen yarns, desires to receive samples of knitting and weaving yarns from manufacturers in Canada.

1540. Woollen Yarns.—A Japanese firm catering to the requirements of spinning mills and importing bobbins, weaving machinery and other accessories, desire to receive samples of woollen yarn as follows: Hosiery materials, 2/20s., 2/24s., 2/32s., 2/48s.; muslin materials, 2/48s., 2/52s., 2/60s., 1/64s. Samples and price lists should be despatched as soon as possible.

1541. Woollen Yarns.—A Britisher of many years' standing in Yokohama is interested in receiving samples and prices of Canadian woollen yarns of all kinds, with a view to obtaining his requirements from Canada.

1542. Woollen Yarns.—A large and responsible importer in Tokyo, who handles large quantities of imported yarns, is now in the market for hand-knitting yarn and hosiery yarn (count 2/20 m/m and 2/32 m/m). Samples and price lists for these yarns, both dyed and undyed, are requested immediately, and if same are competitive with other sources of supply there are good possibilities of business.

1543. Paper.—A Japanese importer in Osaka would be glad to obtain supplies of kraft, parchment and marble paper in Canada. Samples and prices requested.

1544. Rosin and Turpentine.—A company in the North of England wish to get into touch with Canadian producers of rosin and turpentine, or Burgundy pitch, for which they report an opening.

1545. Liquid Rosin.—A London firm wish to obtain supplies from Canada of liquid rosin, a by-product of pulp mills. Sample of what they are at present purchasing from Baltic countries is available at the Department of Trade and Commerce, Ottawa.

1546. Products of Wood Distillation.—An important Japanese importer of chemicals desires to receive samples and quotations from Canadian manufacturers of methyl alcohol, acetone, acetate of lime and formaldehyde. This firm claims to be one of the largest importers of these products, and can promise interesting business to any Canadian manufacturer in a position to supply their requirements.

1547. Blowers and Forges.—A firm in Port Elizabeth, Cape Province, South Africa, would like to hear from Canadian manufacturers of blowers and forges.

1548. Perfumery and Toilet Preparations, Drugs and Chemicals, Fancy Goods, Electrical Appliances, Automobile Accessories and Specialties and Tools of Trade are requested by a manufacturers' agent in Melbourne. Cash against documents.

1549. Talc for Paint Manufacture and Finer Grades for Toilet Preparations.—Samples and prices are desired by a manufacturers' agent in Melbourne.

1550. Padlocks.—A Japanese commission firm writes that they are interested in the import of padlocks, and would like to have samples and prices of Canadian products.

1551. Wire Nails.—A firm in Osaka, Japan, specializing in the import of iron, steel, metals, etc., are very much interested in the import of Canadian wire nails. Prices, samples and full particulars regarding discounts, etc., are requested immediately.

1552. Screws.—A Japanese commission house desires to hear from Canadian manufacturers of flat-head iron wood screws, with samples and prices c.i.f. Japan.

1553. Steel Hinges.—A firm in Osaka, Japan, importing large quantities of hardware, desire to receive samples and prices of wrought steel narrow butts, samples and specifications of which may be had upon application to the Department of Trade and Commerce (quoting file T.C.-4-164).

1554. Automatic Railway Couplers.—A Japanese firm who have been supplying couplers to the Imperial Government Railways desire to receive specifications and prices of Canadian manufactured automatic couplers. The Japanese railways have been using the "Sharon" and "Alliance." Prices c.i.f. Japan on quantities of 5,000 to 10,000 pieces are requested.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From Montreal

To Avonmouth.—Oxonian, White Star-Dominion Line, May 2; Concordia, Cunard Line, May 5; Welshman, White Star-Dominion Line, May 12.

To Cardiff and Swansea.—Canadian Challenger, May 4; Canadian Mariner, May 18; Canadian Explorer, June 1—both of the Canadian Government Merchant Marine.

To Glasgow.—Metagama, Canadian Pacific Steamships, Ltd., May 3; Athenia, Anchor-Donaldson Line, May 4; Marvale, Canadian Pacific Steamships, Ltd., May 10; Saturnia, Anchor-Donaldson Line, May 11.

To Hull.—Ariano, Furness Line, May 8; Comino, Furness Line, May 22.

To Liverpool.—Montcalm, Canadian Pacific Steamships, Ltd., May 4; Canada, White Star Line, May 5; Montrose, Canadian Pacific Steamships, Ltd., May 11; Kastalia, Cunard Line, May 11; Regina, White Star Line, May 12.

To London.—Valencia, Cunard Line, April 28; Bolingbroke, Canadian Pacific Steamships, Ltd., May 5; Ausonia, Cunard Line, May 5; Brecon, Canadian Pacific Steamships, Ltd., May 12; Virgilia, Cunard Line, May 12; Welland County, I.C. Transports, Ltd., May 15.

To London and Antwerp.—Canadian Victor, May 9; Canadian Commander, May 23; Canadian Planter, June 6—both of the Canadian Government Merchant Marine; Lord Dufferin, I.C. Transports, Ltd., May 28.

To Manchester.—Manchester Regiment, May 10; Manchester Shipper, May 17; Manchester Division, May 24; Manchester Brigade, May 31; Manchester Hero, June 7—all of the Manchester Liners, Ltd.

To Newcastle and Leith.—Cairnvalona, May 4; Cairntorr, May 11; Cairnavon, May 18; Cairnmona, May 25—all of the Thomson Line.

To Southampton.—Minnedosa, Canadian Pacific Steamships, Ltd., May 9; Melita, Canadian Pacific Steamships, Ltd., May 23.

To Belfast.—Rathline Head, Head Line, May 25.

To Cork.—Carrigan Head, Head Line, May 30.

To Dublin.—Melmore Head, Head Line, May 25.

To Norwegian Ports.—Idefjord, Norwegian-American Line, May 19.

To Rotterdam.—Hoerda, I.C. Transports, Ltd., May 7; Essex County, I.C. Transports, Ltd., May 23; Seattle Spirit, Rogers & Webb, May 24; Kenbane Head, Head Line, May 30.

To Hamburg.—West Kebar, Rogers & Webb, May 5; Hoerda, I.C. Transports, Ltd., May 7; Essex County, I.C. Transports, Ltd., May 23; Seattle Spirit, Rogers & Webb, May 24.

To Copenhagen.—Pennsylvania, Scandinavian-American Line, about May 20; Arkansas, Scandinavian-American Line, about June 20.

To Copenhagen, Gothenburg, Christiania, Helsingfors and Other Scandinavian and Baltic Ports.—Hickman, Sprague Lines, May 15; Aledo, Sprague Lines, June 15.

To Antwerp.—Rawtry, Canadian Pacific Steamships, Ltd., May 5; West Kebar, Rogers & Webb, May 5; Minnedosa, Canadian Pacific Steamships, Ltd., May 9; Melita, Canadian Pacific Steamships, Ltd., May 23.

To Havre.—Welland County, I.C. Transports, Ltd., May 15; Essex County, I.C. Transports, Ltd., May 20; Lisgar County, I.C. Transports, Ltd., May 27.

To South African Ports.—Benguela, Elder-Dempster Line, May 5.

To New Zealand and Australia.—Atholl, New Zealand SS. Co., May 10; Canadian Pioneer, Canadian Government Merchant Marine, May 26; Canadian Cruiser, Canadian Government Merchant Marine, June 26.

To Bermuda, Barbados, Trinidad and Demerara.—Berwyn, Canadian Pacific Steamships, Ltd., May 8; Bedwyn, Canadian Pacific Steamships, Ltd., May 23.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—Canadian Forester, May 3; Canadian Fisher, May 24—all of the Canadian Government Merchant Marine.

To St. Kitts, Antigua, Barbados, Trinidad and Demerara.—Canadian Squatter, May 5; Canadian Carrier, May 16; Canadian Otter, May 30—all of the Canadian Government Merchant Marine.

To Havana.—A steamer, Guy Tombs, Ltd., May 3.

To St. John's (Nfld.), via Charlottetown.—Canadian Sapper, Canadian Government Merchant Marine, May 5, 26, and June 16.

To St. John's (Nfld.).—Mapledawn, Canada Steamship Lines, May 5; Mons, Newfoundland Shipping and Trading Co., May 5.

From Quebec

To Liverpool.—Montlaurier, Canadian Pacific Steamships, Ltd., May 18.

To Southampton.—Empress of Scotland, Canadian Pacific Steamships, Ltd., May 12; Empress of Britain, Canadian Pacific Steamships, Ltd., May 26.

To Hamburg.—Empress of Scotland, Canadian Pacific Steamships, Ltd., May 12.

From Halifax

To Liverpool (via Newfoundland).—Sacha, Furness, Withy & Co., Ltd., May 14.

To Bermuda, St. Kitts, Antigua, Montserrat, Dominica, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad and British Guiana.—Royal Mail Steam Packet Co., May 11 and every fortnight.

To St. John's (Nfld.).—Belvernon, Tri-National SS. Corporation, April 28.

From St. John

To Havana.—A steamer, Nagle & Wigmore, April 30.

To Rio de Janeiro, Santos, Montevideo and Buenos Aires.—Hortensius, Houston Line, April 30.

From North Sydney, N.S.

To Newfoundland.—Kyle, Newfoundland Government Railway Commission, tri-weekly (Tuesday, Thurday and Saturday).

From Vancouver

To Yokohama, Kobe and Nagasaki.—Arabia Maru, Osaka Shosen Kaisha, May 12; Arizona Maru, Osaka Shosen Kaisha, May 18.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Shedzuoka Maru, Nippon Yusen Kaisha, May 1; Empress of Russia, Canadian Pacific Steamships, Ltd., May 17; Yokohama Maru, Nippon Yusen Kaisha, May 17.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Canada, Canadian Pacific Steamships, Ltd., May 3; President McKinley, Admiral Oriental Line, May 2; President Jackson, Admiral Oriental Line, May 14.

To Yokohama, Kobe and Moji.—Arabia Maru, Osaka Shosen Kaisha, May 12.

To Yokohama and Kobe.—Tokiwa Maru, Nippon Yusen Kaisha, May 7; Toyooka Maru, Nippon Yusen Kaisha, May 31.

To Yokohama, Kobe and Shanghai.—Canadian Freighter, Canadian Government Merchant Marine, April 30; Stuart Dollar, Dollar Line, April 28; Canadian Prospector, Canadian Government Merchant Marine, May 30; Canadian Transporter, Canadian Government Merchant Marine, June 30.

To Yokohama, Kobe, Hong Kong and Manila.—Philoctetes, Blue Funnel Line, April 28; Tyndareus, Blue Funnel Line, May 26.

To India.—Canadian Winner, Canadian Government Merchant Marine, June 20.

To Auckland, Melbourne and Sydney.—Hauraki, Canadian-Australasian Royal Mail Line, May 15; Waiotapu, first week in June.

To Auckland, Sydney, Melbourne and Adelaide.—Canadian Skirmisher, Canadian

To Auckland, Sydney, Melbourne and Adelaide.—Canadian Traveller, Canadian Government Merchant Marine, May 25; Canadian Scottish, Canadian Government Merchant Marine, June 20.

To Honolulu, Suva, Auckland and Sydney.—Niagara, Canadian-Australasian Royal Mail Line, June 1.

To Napier, New Plymouth, Lyttleton and Dunedin.—Waihemo, Canadian-Australasian Line, May 16.

To Liverpool, London, Rotterdam and Antwerp.—Loch Katrine, Royal Mail Steam Packet Co., second half of May.

To Rotterdam, London and Antwerp.—Moerdyk, Royal Mail Steam Packet Company, loading late April; Drechtydyk, Royal Mail Steam Packet Co., first half of June.

To Supe, Chicama, Callao, Mollendo, Arica, Guayaquil and Corinto.—Regulus, Latin-American Line, about May 25.

To Salina Cruz, San Jose de Guatamala, Balboa, Amapala, Corinto, and such other ports as cargo inducements offer.—Senaloa, Latin-American Line, May 20.

To Manchester (via Panama Canal).—Howick Hall, Manchester Lines, Ltd., June 6.

From Victoria

To Yokohama, Kobe, Shanghai, Manila and Hong Kong.—President McKinley, Admiral Oriental Line, May 2.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Canada, Canadian Pacific Steamships, Ltd., May 3.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Shidzuoka Maru, Nippon Yusen Kaisha, May 1; Yokohama Maru, Nippon Yusen Kaisha, May 16; Empress of Russia, Canadian Pacific Steamships, Ltd., May 17; Kaga Maru, Nippon Yusen Kaisha, June 12; Iyo Maru, Nippon Yusen Kaisha, June 30.

To Honolulu, Suva, Auckland and Sydney.—Niagara, Canadian-Australasian Royal Mail Line, June 2.

SHIPPING COMPETITION

Remarkable changes have taken place since the Treaty of Versailles in the relative positions of the merchant fleets of the world, says the London *Times Trade Supplement*. Though German shipping was surrendered to the Allies, she has since built up a merchant fleet of 3,000,000 tons, most of the vessels being of recent design and built at costs so low as to make them most formidable competitors for the world's carrying trade. German shipping companies are paying dividends of 25 per cent and upwards after placing considerable sums to reserve. On the other hand, the refusal of the United States Congress to pass the Shipping Subsidy Bill has made the prospects of American shipowners dark. An enormous amount of tonnage built in America during the war is laid up, and boats built at high cost are out of the running. Already it is evident that Great Britain's most serious rival in the shipping trade will be Germany, at any rate while her shipowners have the advantage of depreciated exchange.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

W. L. Griffith, Secretary to the Office of the High Commissioner for Canada, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 285 Beaver Hall Hill, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address Canadian.*

Australia

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil

E. L. McColl. Address for letters—Caixa Postal 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China

J. W. Ross. Address for letters—P.O. Box 300. Office—Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba

Address: 400 and 401 Teniente Rey 11, Havana. (Post Office Box 1290.) *Cable Address, Cantracom.*

France

Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland

Norman D. Johnston, Zuidblaak 26, Rotterdam, *Cable Address, Watermill.*

India and Ceylon

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico

C. Noel Wilde. Address for letters, Apartado Num. 126 bis, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian.*

New Zealand

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements

A. B. Muddiman, P.O. Box 121, Singapore. (Territory covers Straits Settlements. British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

Douglas S. Cole, Acting Trade Commissioner, Sun Building, Clare street, Bristol. *Cable Address, Canadian.*

Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States

Frederic Hudd, 44 Whitehall street, New York City. *Cable Address, Cantracom.*

Trade Commissioner P. W. Ward, formerly of Singapore, is at present temporarily attached to headquarters at Ottawa.

CANADIAN COMMERCIAL AGENTS

Australia

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark

C. E. Sontum, Grubbegd, N. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

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DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

Printed by F. A. ACLAND, Printer to the King's Most Excellent Majesty

706

TABLE OF CONTENTS

Commercial Intelligence Journal

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Ottawa May 5, 1923 1005

SUBSCRIPTIONS TO THE *COMMERCIAL INTELLIGENCE JOURNAL* AND ITS ASSOCIATED PUBLICATIONS

The Department of Trade and Commerce desires to announce that, in view of the heavy expense now involved in the publication of the *Commercial Intelligence Journal*, commencing with the 1st of July next a nominal subscription price will be charged for this publication. The price therefor to addresses in Canada will be $1 per annum (single copies 5 cents each); and to addresses outside the Dominion $3.50 per annum (single copies 10 cents each).

Individuals and firms now in receipt of this publication should forward their subscriptions addressed to "The Accountant, Department of Trade and Commerce, Ottawa, Canada"; and it will be understood that those who do not forward their subscriptions before July 1 no longer desire to receive it, and their names will be removed from the mailing list.

It should be specially noted that those who pay an annual subscription will receive on request, without extra charge, the special reports issued from time to time in the form of Supplements to the *Commercial Intelligence Journal*. Those who are not on the regular mailing list may purchase these special reports at a cost of 25 cents each to addresses in Canada, and 35 cents outside the Dominion.

Remittances may be made by money or express orders, or drafts, or cheques, payable at par in Ottawa, or Canadian postage stamps.

FREE IMPORTATION OF HOLLAND BRICKS INTO UNITED STATES

Mr. F. H. Palmer, Assistant Canadian Trade Commissioner in the United States, writes under date April 24, 1923, that bricks from Holland will be permitted to enter the United States duty free under paragraph 1536 of the Tariff Act as the result of a Treasury decision announced April 23 advising customs collectors that Holland does not impose duty on bricks from the United States.

In this connection it should be noted that as Canada imposes a duty of 22½ per cent on building brick, so also does the United States levy a duty on brick imported from Canada as provided for in paragraph 1536 of the United States Tariff Act of 1922.

TRADE COMMISSIONER B. S. WEBB'S ITINERARY IN CANADA

Mr. B. S. Webb, Canadian Trade Commissioner in the Argentine Republic, who is now on tour through Canada, has found it necessary to make some changes in the dates of his visits to cities as previously announced. His rearranged itinerary is as follows:—

Toronto	May 7 to 12
Niagara Falls	" 14
Welland	" 15
St. Kitts	" 16 and 17
Cobourg	" 18
Oshawa	" 19
Hamilton	" 21 to 24
Smith's Falls	" 25
Carleton Place	" 26

The dates for the remainder of his tour will be announced after his return to Ottawa on the 26th of May. Firms in the towns and cities included in the above table who desire to be brought in touch with Mr. Webb or to interview him, should address their communications to the Secretary of the local Board of Trade, or Chamber of Commerce.

EXCHANGE AND BUSINESS CONDITIONS IN BRAZIL

Mr. E. L. McColl, Canadian Trade Commissioner, Rio de Janeiro, sends under date April 27, 1923, the following cable on exchange and business conditions in Brazil:—

"Although in April milreis was firmer, there is no possibility of a rise in the near future as Government sales of hypothecated coffee exclude foreign bills. Low value of the milreis protects national manufacturing industry, which is flourishing. Recovery of Brazilian securities on the London stock exchange proves local confidence in future to be shared abroad."

CANADIAN EXPORTERS TO GREAT BRITAIN SHOULD QUOTE C.I.F. STERLING PRICES

Mr. Gordon B. Johnson, Canadian Trade Commissioner in Glasgow, writes under date April 13, 1923, strongly urging that Canadian exporters to Great Britain should quote c.i.f. sterling prices. Letters arrive daily from Canadian firms quoting f.o.b. Canadian port of shipment, and sometimes even f.o.b. interior point, although sometimes in the latter case the freight charges to the seaboard are paid. The necessity for c.i.f. quotations has been pointed out frequently to Canadian exporters. While there was good reason for f.o.b. quotations during the war and for some time afterwards when exchange and freight ratse were fluctuating immoderately, there is no real reason to-day why the seller should not meet the buyer in this respect, especially when in most cases the interest of the importer cannot be secured without c.i.f. quotations. There is no doubt that the majority of Canadian firms do not realize this, and business is being lost in consequence.

TRADE CONDITIONS IN THE UNITED KINGDOM

C. G. Venus, Office of the Trade Commissioner in London

London, April 17, 1923.—The trade position in Great Britain remains unchanged. The brighter tone which has been apparent recently is maintained, and is reflected in the slight increase which is again recorded in the general level of wholesale prices of commodities other than foodstuffs. It is true that "iron and steel" are largely responsible for the increase, due to the dislocation of German competition, but "metals and minerals" and certain other articles also share in the rise.

The shipbuilding returns just issued by Lloyd's Register of Shipping for the first quarter of the year also indicate a healthier situation, the total under construction in Great Britain and Ireland being greater by nearly 24,000 tons than in the previous quarter, marking the first sign of an arrest in the decline which has been experienced in this important industry for two years.

The stock markets as well have been characterized by more buoyant conditions, resulting from the better demand for securities, and cheaper money. A number of capital issues recently floated have met with success, and it is stated are likely to be followed by other similar development.

With regard to overseas trade, the returns for March, as compared with the previous month, register advances both in imports and exports, imports expanding by £6,000,000 and exports by £3,000,000. The increases are, however, largely discounted by the extra days occurring in March. Taking the figures for the first quarter of the year, exports show only a fractional decrease compared with the same period of last year, but imports are 17 per cent greater, wholly attributable to raw materials. This is encouraging for the future, since purchases under this heading enter largely into exports of British manufactured goods.

It is not possible to refer to importations of specific items from Canada, because owing to a strike in H.M. Stationery Office, the Board of Trade has issued only summaries of the trade figures, the complete accounts not being available at the time of writing.

THE BUDGET

The Government fiscal year which has just terminated yielded a surplus revenue of £100,000,000, which is being applied to the redemption of the public debt, and has simplified the problem of national finance for the present year. Partly resulting from this and economies to be effected, in spite of the huge burdens which have still to be shouldered in the shape of interest charges and the repayment of loans, the Chancellor of the Exchequer announced in introducing his Budget into the House of Commons yesterday that he had been able to reduce taxation in several directions.

From a business point of view the most welcome, if slight, relief will be the lowering of the income tax by 6d. in the pound, and the halving of the corporation tax, which in their united effect will tend to stimulate activity, both by increasing the purchasing power of consumers and swelling the total of moneys available for capital investment. Postal charges are also to be revised in a downward direction.

The remaining proposals in the Budget contain nothing of interest to Canadian export trade, excepting that the import duty on cider of 4d. per gallon is to be abolished, and this will make no difference to the relative position of Canadian imports of this commodity because the Government intend also to remit the corresponding excise duty on home-produced cider.

MARKET CONDITIONS IN THE BRITISH WEST INDIES

TRADE COMMISSIONER E. H. S. FLOOD

Barbados

Barbados, April 9, 1923.—As was anticipated, the Easter trade was good and came up to expectation. The advance in the price of sugar, which reached $5.70 during the month, and an average crop in view, have inspired such a degree of confidence that business in the Bridgetown shopping centre was brisk and much better than at the same season last year.

In the dry goods trade wholesale buyers are holding back due to a drop in the cotton market and expectations of a further decline. Lines of Canadian silk goods were shown this Easter, but not being the class of goods usually sold here, did not attract proper attention. There is, however, an opening for Canadian silk goods of the style and finish required.

The customs returns for 1922, in summary, were published during the month, and show a decline in the imports as compared with 1921 of £161,953. Trade with Canada fell off somewhat in volume, but remained about the same in percentage. One of the notable decreases in the imports was in flour.

Produce Market.—A considerable portion of the canes which under ordinary circumstances would have been manufactured into syrup have been sold to the factories to be converted into sugar. Earlier in the year the general opinion prevailed that about 65,000 puncheons of molasses would be manufactured, but it is believed now, owing to the above circumstances, that the output will fall somewhat short of this estimate. So long as sugar maintains its present high level, there will be a tendency for planters to sell their canes to the factories rather than take the trouble of making syrup. In addition, it is found that the yield of sugar per ton of cane, on some of the estates, has been disappointing, and this no doubt will to some extent affect the crop of the island in regard to both sugar and molasses.

Stocks of flour and cornmeal are in fair supply, with no appearance of shortness in any of the usual items of foodstuffs or lumber.

Trinidad

Business is dull, and no improvement is apparent in the price of the staple products of the island, except sugar. Unfortunately in the case of sugar, the crop will be less than last year, as due to the low price ruling during the year a less area was put under canes. The crop estimate for the present year is 45,000 tons as against over 60,000 tons last year.

The foodstuffs market is stated to be in full supply of flour, over 19,000 bags having arrived during the month by the Canadian Government Merchant Marine ships. Contrary to expectation, the demand for fishstuffs did not improve as is usual during the Lenten season, and there are heavy stocks of Nova Scotia fish on hand. Lumber is arriving in small lots, with a quiet demand, and requirements well filled.

British Guiana

No advices have been yet received which would indicate that general business conditions in British Guiana show any improvement. A feeling of optimism, however, prevails on account of the fair crop of sugar likely to be obtained this season, and for the relatively high price at which it is being marketed.

The export figures for some of the leading articles of local produce from January 1 to March 15, recently published, show increases in balata, lumber,

copra and diamonds, but in nearly all the other items, including coconuts, coffee, rice, sugar and gold, there are decreases as compared with the corresponding period last year.

Some considerable interest is now being taken by the Government in reference to the colony's timbers, and efforts will be made in the near future to exhibit in foreign countries full samples of the various woods that can be obtained in the forests of the colony in commercial quantities.

A sufficient sum of money has been voted by the Government to enable the Forestry Officer to attend a meeting of the Forestry Conference to be held in Canada, and a further vote of £20,000 for the Empire Exhibition to be held at Wembly in 1924, in which all the colony's produce will be exhibited, including its various woods.

BUSINESS CONDITIONS IN FRANCE IN FEBRUARY AND MARCH

TRADE COMMISSIONER HERCULE BARRÉ

Paris, April 12, 1923.—The rise in prices which has taken place recently on the French market is the most salient factor in the economic situation. In reality, this increase has been expected more or less since the announcement of the budget deficit and the failure of the Inter-Allied Conferences played havoc with the exchange. The partial revival of business which has been noted during the first three months of this year is also to some extent the cause of the increase; demand in many industries is in excess of production. This rise in prices, which became more accentuated in February and March, is highly prejudicial to French industries, and offers to foreign competition a better opening on the French markets. The instability of the situation is responsible for the great hesitation which is being shown on the part of foreign buyers. At the same time, the customs statistics are proof that the exchange of business with foreign countries is much higher this year for the corresponding period than in 1922, but this can only be maintained if prices speedily recover their equilibrium. It is anticipated here that the value of the franc will show improvement if nothing occurs to further cloud the political horizon.

The quantities of coke received from the Ruhr are still inadequate to fill the requirements of French consumers, and this branch of industry is greatly affected. Several big firms have been obliged to diminish their production considerably, but a considerable increase in deliveries is promised within the next few days. The silk manufacturers in Lyons are securing numerous repeat orders, and export trade is particularly good. Great activity reigns in those woollen factories which are well supplied with raw materials. Buyers, however, are refusing to pay the enhanced prices for materials, and business is only done with great difficulty.

CONDITIONS IN THE MATCH INDUSTRY IN NORWAY

Mr. C. E. Sontum, Canadian Commercial Agent in Christiania, Norway, writes under date April 7, 1923, that the match industry in Norway is in a depressed condition. Foreign countries have done very little buying because of the large stocks bought under war conditions still on hand, because of the strong competition from Sweden in spite of the high rates of exchange ruling in that country, and owing to the increases in the tariff duties in some markets being now quite prohibitory. Before the war exports averaged from 5,000 to 6,000 tons per year, while in 1922 these were about 2,370 tons—approximately the same as in 1921. Exports have decreased to less than half the pre-war totals, and consequently factories are running on a very decreased scale of production.

TRADE AND FINANCIAL CONDITIONS IN BELGIUM

Trade Commissioner A. S. Bleakney

Brussels, April 12, 1923.—The imports of all foreign goods into Belgium for February showed a fall of 19 per cent in quantity as compared with January, largely due to the decreased purchasing power of the franc in the latter month. The decline in values is about 13 per cent. Imports of food products from the United States in February were valued at 52·3 million francs as against 50·7 millions in January.

The exchange situation, while restricting buying, is not by any means prohibitive in its effect on the several lines in demand from Canada. Wheat shipments from Canada for February were 13·3 thousand tons; from Argentina, 26·6 thousand tons; from the United States 31·3 thousand tons, as compared with January's showing of 15·3, 33·9 and 36·3 thousand tons for the respective countries.

The last two reports of the Industrial Bourse of Brussels are frankly pessimistic. Demand in general shows a marked falling off. Buyers are reported to be largely covered. While the 450,000 tons of coke seized in the Ruhr is a valuable asset, the actual arrivals are not nearly sufficient to guarantee the operation of the blast furnaces. The coke supply, which is a matter of primary importance, is still unsolved.

To-day's weekly Bourse appeared to be very nervous in regard to exchange. The favourable British budget; scepticism as to receipt of actual reparations from Germany sufficient to support the franc; the prospect of claims for Inter-Allied debts being pressed; and American claims for the troops of occupation, are causes of the present apprehensiveness.

While the industrial situation is essentially sound, before business becomes normal in Belgium, the situation in the Ruhr will require to clear.

CANADIAN EXHIBITS AT THE BRUSSELS FAIR

Mr. A. S. Bleakney, Canadian Trade Commissioner in Brussels, writes as follows, under date April 12, 1923, regarding Canadian exhibits at the Brussels Fair:—

The Brussels Fair is in full swing under excellent weather conditions. Only three stands at which Canadian products were exhibited have been noted, these showing fibre board, cream separators, garden tools, and valves. An exhibit of Canadian goods which are sold in Belgium is, however, being shown by this office concurrently with the fair, in a window of the C.P.R. building on the most populous thoroughfare in Brussels. Among the products represented are Buick and Chevrolet cars, the Empire typewriter, rubber belting, tennis shoes, spiral and ordinary packing from the Consolidated Rubber Company, rubber tires and inner tubes from the Van der Linde Corporation, Palmolive soap, Colin McArthur's wallpaper, Canadian Club whisky, kraft cheese, cheddar cheese, Welland Vale saws and garden tools, Beaverboard, Massey-Harris machinery, canned fruits, canned salmon and canned lobster, hay, honey, tobacco, asbestos, and the standard grades of Canadian grain. This exhibit will run for several months at least, and will be added to from time to time. Several interesting inquiries have already resulted.

MARKET FOR RUBBER COMMODITIES IN SOUTH AFRICA

ASSISTANT TRADE COMMISSIONER JAMES CORMACK

Cape Town, March 22, 1923.—South Africa is a valuable market for the exporter of rubber commodities, but it is not one which is easy of access for the newcomer. He will find strong competition in many lines from local production, and in all lines from established business houses from all parts of the world. Accordingly he must be prepared for slow progress even with an article which is good in quality and cheap in price. Without these he cannot hope to compete. Representation is of course necessary to obtain and hold trade.

In certain lines—tires and mechanical rubber goods—he will find arrayed against him branch houses, depot stocks, expensive organizations, costly advertising, and conservative buyers.

CUSTOMS DUTY

The classification of manufactures of rubber in South Africa is not very extensive, but the local Collector of Customs has supplied information on commodities as aftermentioned. The duty quoted (in brackets) applies to goods of Canadian origin, i.e. the British preference 3 per cent has been allowed for:—

Motor car and bicycle tires.—(a) outer covers (Tariff Item 193), 17 per cent; inner tubes (Tariff Item 193), 17 per cent; solid tubes (Tariff Item 138), free (with deposit pending production of certificate; that used on lorry, etc.).

Rubber footwear.—(Tariff Item 52), 17 per cent; or men's 9d. per pair, women's 6d. per pair, children's 3d. per pair (minimum).

Rubber piping and tubing.—Gas tubing (if with declaration) (Tariff Item 121), free; gas tubing (otherwise) (Tariff Item 193) free.

Rubber hose (Tariff Item 107), free.

Rubber belting (Tariff Item 78), free.

Rubber apparel (Tariff Item 193) (a), 12 per cent.

Rubber Gloves (a) Surgeons' (Tariff Item 188a), free; (b) Electricians' (Tariff Item 114b), free.

Rubber Toys, Balls, Balloons, etc. (Tariff Item 193), 17 per cent.

Druggists' Sundries (Tariff Item 193), 17 per cent.

Rubber Insertion or Packing (Tariff Item 119), free.

Rubber Washers (Tariff Item 81), free.

STATISTICS OF IMPORTS OF RUBBER COMMODITIES

The following statistics are taken from the Annual Statement of the Trade of South Africa for the latest available calendar year, 1921. The classification is in some instances wide, but more detailed figures, especially for rubber goods, are not published. For the convenience of Canadian exporters, the sterling figures have been converted into our currency at par.

Footwear—not Leather—Rubbers and Plimsolls—	
Total	$130,290
United Kingdom	95,945
United States	29,120
Canada	4,340
India-rubber, Macintoshes and Oilskins—	
Total	179,625
United Kingdom	105,335
United States	77,615
Canada	....
Belting and Bands (not Leather)—	
Total	570,825
United Kingdom	291,890
United States	271,665
France	166
Canada	7,070
Hose (Stem and Suction)—	
Total	23,829
United States	17,806
United Kingdom	6,123

STATISTICS OF IMPORTS OF RUBBER COMMODITIES—*Concluded*

Rubber Tires—	
Total	$1,388,465
United Kingdom	511,870
United States	228,010
France	395,382
Canada	117,645
Italy	127,000
Rubber Manufactured (not Tires, Hose and Belting)—	
Total	411,345
United Kingdom	182,870
United States	47,060
Canada	5,304
France	3,575
Waterproof Cloth and Sheeting—	
Total	55,670
United Kingdom	43,420
United States	8,668
Canada	2,120

RUBBER TIRES

The most valuable market in rubber lines, as will be seen from the figures quoted, is for tires. The countries at present chiefly supplying this market are the United Kingdom (with Dunlop, North British, etc.); Canada and the United States (with Goodyear, Goodrich, Dominion, Firestone, Pirella, etc.); France (with Michelin and Bergounen, the latter a cheap line now being imported); and Germany (with Continental).

There are many more cars of American than United Kingdom origin in South Africa, and of course the original tire equipment is mostly with the straight-side tire, which is said to be more popular here than other types. In the matter of replacement, however, buyers are not so consistent, and they usually want to experiment and deal in the cheaper lines and give other than straight-sided tires a chance.

The fabric tire is practically going right out of the market, except as a cheap line. The public has now been educated to the cord tire and the demand is increasing.

While no special sizes of tires predominate in South Africa, the greater portion are made up of the following sizes: 30 by 3½ inches and 815 by 105 mm., beaded edge; 32 by 4 inches, straight side; 821 by 120 mm., 880 by 120 mm., and 760 by 90 mm., beaded edge; 34 by 4½ inches, straight side; 700 by 80 mm. and 710 by 90 mm., beaded edge. But it should be kept in mind that there are relatively few good or main roads, and that in most parts of South Africa warm to hot weather predominates for the major part of the year. Standardization of rims has reduced the range of sizes of pneumatic tires by about a half.

Solid tires for heavy vehicles are declining in number, and are being replaced by the semi-pneumatic or by pneumatic tires on the back wheels. The former is an excellent shock-absorber and gives little trouble to the users. There is no standardization in vehicles using solid tires, consequently a larger range of sizes has to be stocked and dealers are not inclined to push their sales.

INNER TUBES

The red rubber tube is more popular than the grey. It is understood that the chief reason is that during the war the imported grey tube was defective, and in consequence the buying public has not yet got over the prejudice against this colour.

BICYCLE TIRES

Bicycles are not so much in evidence as in some other countries, and as far as can be judged nearly all the cycles are of English manufacture and are supplied with tires from that country. There is little doubt that the Dunlop Company have the strongest hold on the market at present. A Canadian bicycle tire is at present in growing popularity; its trade should expand with proper care, as it is proving equal to the best of those now doing the lion's share of the business.

RUBBER FOOTWEAR

This subject has been recently treated by the writer and the report thereon appears in *Commercial Intelligence Journal* No. 986 (December 23, 1922). The situation has not changed since then except perhaps that the idea of using rubber shoes is extending to practically all branches of sport; golfers, cricketers, and others showing increased interest therein. These sports require a heavier type of shoe than is required for tennis or gymnasium work, and these lines will have to be specially cared for in course of time. In the Cape Peninsula the trade in rubbers is only fairly good, and in Johannesburg there is also a restricted market; in the other parts of the country rains usually fall in summer and dry up almost immediately, so that there is little demand.

Rubber boots have a fair sale in the knee lengths, but little in the thigh lengths. In this province the ordinary rubber-soled gum boot sells best, while on the Rand those fitted with Parker leather hob-nailed soles are most suitable.

Rubber soles are fairly popular. Neolin soles are advertised a great deal and have a good hold on the market. Phillips' also are popular, especially as they can be fixed on at home.

There is still a fair demand for the revolving rubber heel, and the market is held by British companies. The shaped heel is quite popular, and its sale is increasing because of its much better appearance on the boot. An effort is being made with the local shoe manufacturers to have them turn out their products with rubber heels, and it is thought that it is only a matter of time before they will be in the market.

BELTING

South Africa affords a comparatively large market for rubber belting, both rubber-faced belting and rubber-impregnated transmission belts, the latter minimizing frictional heat and the former being impervious to damp and assimilating shock. Over 21,000 tons of rubber belting were imported from the United States in the first ten months of this year.

In Natal it seems to be the experience of the sugar mills that balata belting disintegrates more rapidly than rubber-impregnated belting, and that the edges of the balata belting wear out more quickly where it is necessary to shift frequently from one machine to another. Dealers in Durban estimate that there is a saving of about 50 per cent in using the rubber-impregnated in place of the balata in the sugar mills. In the Cape Town district rubber-impregnated belting is used extensively for power transmission. Rubberized driving belts are about equally popular with balata for use in the gold fields and for conveying purposes there, but the great demand is for rubber-impregnated belting. From the figures quoted for 1921 it can be seen that the value of the imports of conveyor belting to South Africa was roughly 12 per cent of the total value of imports of belting of all kinds

The demand for balata belting varies in different parts of the Union, and it is thought that its recently increased popularity is due in part to its lower

cost as compared with other kinds of belting. It is estimated that about 5 per cent of the conveyor belting on the Witwatersrand is of balata, while about 40 per cent of the transmission belting used in the gold mines is of balata. One engineer conversant with the trade states that the melting point of balata gum is too low for local climatic conditions, and that instances have arisen where the balata has become fluid on account of the friction developed in operating the belts on days of high temperature.

Leather competes with rubber as a material for driving belts, and, especially where gas or oil is used, it seems to be gaining in popularity, but it is stated to be less consistent in texture and therefore inclined to have weak spots. Leather driving belts make up about 30 per cent of the total above mentioned.

HOSE

Garden hose of Canadian manufacture is selling quite well. There is an extensive demand, with competition mostly from the United Kingdom and the United States. Air hose (i.e. for use on jack hammers, etc.) sells well on the Rand, and United States firms have for some time been holding the bulk of it, but locally manufactured hose is now rapidly overhauling it on account of the policy of preference accorded to local industries. Delivery and suction hose have but a moderate sale.

RUBBER SUNDRIES

Gloves are in small demand for household purposes; but there is some trade to be done for hospital and surgical use, and a considerable quantity are required for the tanning and canning trades.

Hot-water bottles.—Quite a number of these are in use, and the trade here has been long dominated by the United Kingdom; the square-shouldered bottle is the best seller. The shape is usually a factor against the Canadian make. Fancy work round the edges helps to deteriorate the bottle; one that is perfectly smooth is preferred.

Druggists' sundries.—United Kingdom manufacturers, due to the excellent finish of their products, have a strong hold on this business.

Balloons, toys, etc.—Continental manufacturers have recently dominated this trade chiefly on account of cut prices.

Matting and flooring.—These are gaining in popularity and are used mostly in the cities for clubs and the larger buildings, on account of their longer life as compared with floorcloth, etc. The price, however, is still too high to command much trade. It has also been found impracticable to stock much of this class of goods, and of course the local producer can offer much quicker deliveries than the importer or overseas house with stocks here, and accordingly offers serious competition.

GENERAL CONCLUSION

The use of rubber goods in South Africa will grow, especially in footwear. The average Canadian exporter will, however, find difficulty in getting hold of the worthwhile end of the trade, as a strong selling organization is necessary to compete with the large rubber concerns now struggling for the business. Local manufacturers are gaining a strong hold, and the Government are committed to assisting them wherever possible. Tires are almost the only lines which the local factory does not make; the only chance for new tires is to send a stock on consignment and do some advertising.

THE WHISKY TRADE IN JAMAICA

F. L. Casserly, Canadian Trade Commissioner's Office

Kingston, Jamaica, April 10, 1923.—The imports of whisky into Jamaica are fairly considerable, supplies being drawn almost entirely from the United Kingdom. In the year 1921, 50,322 gallons of this spirit were brought into the island, while during the first nine months of 1922 (the latest period of record), the imports were 40,374 gallons, the value of which has not yet been assessed by the Customs Department. The usual method of distribution is through an agent on the spot, who buys outright and sells to clubs, bars, hotels and other consumers; but a certain amount of business is likewise done on a consignment basis.

The quality in demand is almost uniformly high-grade Scotch; it is a common saying in Jamaica that one sees more brands of Scotch whisky here than in Scotland itself. There is practically no market for low-grade whiskies in Jamaica, because whisky-drinkers invariably belong to the upper classes; the black and coloured sections of the population prefer rum and the many preparations thereof which sell under the generic heading of "native wines and cordials".

Under the Jamaican Tariff, British and Canadian whisky pays import duty at the rate of 22s. 6d. per gallon of proof spirit, as tested by Sykes' hydrometer, while the foreign product pays 30s.; it being provided, however, that the preferential rate shall not be less than 19s. and the general rate not less than 25s. 4d. per liquid gallon. In addition to these duties, there is a package tax of 1s. per case, which is levied on both British and foreign spirit. (In practice, the preference does not amount to anything, since 99½ per cent of Jamaica's whisky supplies originate in the United Kingdom.)

The principal brands on the market, with their wholesale selling prices, per case of 12 reputed quarts, are as follows: Johnnie Walker, 82s.; Black and White, 70s.; White Horse, 67s. 6d.; Haig & Haig, 72s.; White Label, 72s.; Green Stripe, 72s.; Grant's Liqueur, 68s.; and Peter Dawson, 60s.

RE-EXPORT BUSINESS

The re-export trade in whisky has existed in a small way for a number of years, but was given a great impetus by the passing of dry legislation in the United States. The volume of this trade was particularly noticeable in 1921 when, out of total imports aggregating 50,322 gallons, 24,377 gallons were sent out of Jamaica, distributed as follows:—

Bahamas	19,040 gallons
British Honduras	422 gallons
United States	3,013 gallons
Panama	455 gallons
Other countries	1,547 gallons
Total	24,477 gallons, valued at £33,658

During the first nine months of 1922, the re-exports are given by the Customs Department as follows:—

To Bahamas	5,739 gallons
To British Honduras	1,708 gallons
To Newfoundland	7,708 gallons
To United States	2,165 gallons
To Panama	681 gallons
Other countries	1,457 gallons
Total	19,449 gallons (value not yet assessed)

It should be noted that re-exports to the Bahamas fell off considerably as compared with the previous year; this is due to the development of direct trade between Great Britain and the Bahamas, and does not denote any sensible decline in that Colony's purchasing power.

From the Jamaican end, this business has generally been on the basis of straightforward sales; cases of "bootlegging" are very exceptional, for the Jamaican Customs regulations are so strict and so manifold that it is extremely difficult for a vessel to clear for any but a bona-fide destination. On all whisky re-exported,—irrespective of country of origin—the Jamaica Government collects an export tax at the rate of 5s. per case of 12 reputed quarts or 24 reputed pints. Should the whisky be in bulk, the export duty is £12 10s. per cask not exceeding 100 gallons, and £1 5s. for each additional 12 gallons or part thereof. These duties were imposed about a year ago, when the Government decided to make something out of the re-export trade; they are entirely independent of the schedule set out in the third paragraph of this report, which is applicable only to whisky going into consumption in Jamaica.

INDIA'S EXPORTS IN FEBRUARY HIGHEST ON RECORD

TRADE COMMISSIONER H. A. CHISHOLM

Karachi, March 27, 1923.—The foreign trade returns for British India for the month of February, 1923, show that Indian merchandise continues to be exported in ever-increasing volume, while the value of imported merchandise continues to contract. Indian goods exported during the month mounted in value to the high-water mark of 30½ crores of rupees, or nearly $95,000,000—representing an increase of nearly 50 per cent over the figures for February of last year and of 10 per cent over the previous month's figures. On the other hand, the value of foreign merchandise imported during the month amounted to less than $60,000,000, which represents a slight decrease from the figures for February of last year and for January of the current year. The balance of trade in merchandise would thus appear to have been considerably in India's favour, but heavy imports of gold and silver treasure, amounting in value to nearly $35,000,000, just about balanced the foreign accounts for the month.

INCREASED COTTON TRADE

While nearly all Indian products shared in the buoyancy of the February export trade, good prices for raw cotton resulted in greatly increased shipments to Japan, which took nearly 50 per cent of the total of 91,000 tons of raw cotton exported during the month. On the other hand, India's imports of cotton piece goods amounted to no less than 147,000,000 yards—an increase of nearly 100 per cent over the corresponding month of 1922. Imports of almost all other lines of foreign goods decreased in value.

During the eleven months ending February, 1923, as compared with the corresponding period of the previous fiscal year, the value of India's merchandise imports decreased by 13 per cent to 214 crores or roughly $650,000,000, while the total exports increased by 29 per cent to 281 crores or nearly $850,-000,000. During the same period gold and silver were imported to the value of nearly $170,000,000. After all visible transactions are taken into account, a favourable trade balance of about $65,000,000 remains as compared with an adverse balance of nearly $100,000,000 for the corresponding period of the previous fiscal year.

WHEAT CROP OF INDIA

Trade Commissioner H. A. Chisholm

Karachi, March 24, 1923.—The second wheat forecast for the season 1922-23, issued by the Government of India on March 14, estimates the total area of wheat sown at 30,032,000 acres as compared with the revised figure of 28,406,000 acres at the corresponding date of 1922. Weather conditions are reported to be generally favourable, and the condition and prospects of the crop, on the whole, are generally good. The cutting of wheat is now under way in Central India, while wheat harvesting operations will be commenced in the Northwest in April. The writer has been able to confirm this favourable forecast by actual observation in districts scattered throughout the great wheat-growing areas of the country. Rainfall and moisture conditions have been satisfactory over 95 per cent of these areas. During the first fortnight in March cloudy weather caused the appearance of rust in some districts in the Punjab, but continued sunshine has since arrested its progress.

India's total production of wheat in 1922 was 9,813,000 long tons, which is well above the previous five-year average. The official estimate is that this year's yield will be 11,400,000 tons, the largest on record.

LIGHT WHEAT EXPORTS

It was expected that prospects of a good harvest would have brought out considerable quantities of wheat for export. But during the first eleven weeks of 1923, about 80,000 tons have been exported from India's wheat port, Karachi. The greater portion of this quantity went to Liverpool, although a few cargoes were destined for London and Antwerp. At the corresponding period of last year, India was importing weekly several thousand tons of Australian wheat to make up the deficiencies caused by the very short crop of 6,706,000 tons harvested in 1921.

The price of export wheat at Karachi now averages Rs. 5 per maund of $82\frac{1}{2}$ pounds, or the equal of about $1.15 per bushel. This wheat is now being purchased from the farmers up country for about 95 cents per bushel. As the Indian farmer was getting over a dollar and a half for his wheat only a few months ago, he is not now disposed to sell much of his wheat for what appears to him to be a very low level. In fact it is thought that India will export very little wheat either this year or next year, even if both crops turn out well above normal, unless export prices reach a higher level than they are at present. Indian peasants who before the war could not afford to eat wheat cakes have now acquired a definite taste for them, and they can moreover afford to use flour at the present low level of food prices and the comparatively high level of wages. New flour mills are being constructed all over India, and in contrast to most other new industrial ventures in the Peninsula, they are all paying good dividends. It is therefore doubtful whether enough Indian wheat will be available for export this year to make any appreciable addition to the world's exportable surplus:—

MARKET FOR APPLES IN THE UNITED STATES

FREDERICK H. PALMER, ASSISTANT TRADE COMMISSIONER IN THE UNITED STATES

New York City, April 28, 1923.—The official estimate of the commercial apple crop of the United States for 1922 shows a remarkable increase of about 50 per cent over the crop estimate of 1921, from 21,557,000 to 31,090,000 barrels.

Of this production the State of Washington supplied 7,000,000 barrels; New York, over 6,000,000; while Pennsylvania, Virginia, Illinois, Michigan, Missouri, Colorado, Oregon and California each contributed to the commercial supply over 1,000,000 barrels.

These statements indicate an adequate supply of apples throughout the Union, for the present season, although the huge wage-earning population of the Atlantic Coast States betokens a market in that section which of necessity must draw on other parts of the Republic for adequate supplies.

EXPORTS AND IMPORTS

In view of the unusual delays attending the publication of import statistics by the United States Bureau of Commerce—those for the month of November only having been received on March 26—one might assume, for the purpose of this report, that the export statistics of Canada will furnish sufficiently accurate information as to the quantities of apples imported. Inspection of the subjoined tables will show the tremendous effect the heavy crop in the United States has had, on both imports and exports.

APPLES EXPORTED FROM THE UNITED STATES

(United States Bureau of Foreign and Domestic Commerce)

Month.	1921 Barrels	1922 Barrels	1922 Boxes
July	8,906	13,770	60,853
August	19,639	77,323	69,794
September	22,204	88,921	126,935
October	129,124	134,843	357,706
November	200,052	150,618	632,270
December	189,530	59,384	680,673

	1922 Barrels	1922 Boxes	1923 Barrels	1923 Boxes
January	12,180	435,467	50,773	501,098
February	25,444	380,683	33,130	562,543

APPLES IMPORTED INTO THE UNITED STATES FROM CANADA

(Dominion Bureau of Statistics)

Month.	1921 Barrels	1922 Barrels
July	3	0
August	16,388	277
September	76,524	9,534
October	257,058	33,509
November	113,728	21,593
December	16,375	4,979
	1922	1923
January	5,199	1,153
February	126	144

Tables showing destination of the exports are available for inspection at the Department of Trade and Commerce, Ottawa (refer to file 26348).

IMPORT DUTIES

Paragraph 734 of the United States Tariff Act of 1922 provides that an import duty of 25 cents a bushel of 50 pounds shall be levied and collected on apples green or ripe. There are no regulations in force respecting embargoes or restrictions of imports of apples from Canada.

NEW YORK MARKET PREFERENCES

Taking the New York market as a whole, there is a general first preference for the McIntosh variety of apples in the medium and small sizes. The general second choice appears to be for the large sized Spitzbergen, with the next choice for Winesaps. From holding the first place a few years ago, the Delicious variety is now fourth, and then only very large sizes command a steady market—the small sizes averaging $1.50 per box against $4 for the choicer sizes.

PACKING

New York is essentially a select market, and the better qualities of fruits of all kinds—foreign and domestic—readily are sold. For this reason boxed apples would probably command the more ready market. Packed in this form they are more easily handled, and the shape of the package lends itself to more economical storage. It is also thought that the use of boxes permits better packing, with uniformity as to size, colour, shape and maturity. For these same reasons boxed apples also lend themselves more readily to display purposes.

However, the older trade, being more used to barrelled apples, still inclines to a preference for apples packed in this way. New York State apples are generally packed in barrels.

SCALES OF SIZES

Very large	88 and under
Large	96 — 125
Medium	138 — 163
Small	175 — 200
Very small	216 — 252

USUAL BASIS OF SALE

The basis of sale is very flexible and depends directly on the market conditions. When the supply of fruit exceeds the demand naturally the seller seeks the buyer, and fruit must be sent to the market to be sold for the best prices then obtaining. In such cases fruit may be brought to New York and stored against the time when its position (in store in New York) would give it some advantage, for instance, during a period of traffic delays. In years when the supply is plentiful the business is usually conducted on a consignment basis.

Conversely, in seasons when fruit is scarce, the buyer seeks the product. Then individual contracts are made, with individual terms of credit and delivery.

SYSTEM OF DISTRIBUTION

At present the New York market is a buyers' market, and considerable quantities of fruit are arriving for disposal on a consignment basis. In this case the fruit is usually shipped to a commission house in carload lots. If this firm are not able to dispose of the consignment through their usual channels,

after notifying their principals, or as a result of a clause in the selling agreement to avoid an accumulation of storage charges, the fruit would be placed in the hands of an auctioneer. There are four recognized firms employed in this work, who also distribute fruit directly consigned to them.

As a general rule all fruit for auction is properly and very carefully displayed in a large day-lighted warehouse—usually Erie Pier 20. For convenience each lot of fruit is given a number, corresponding with a number in a catalogue printed and distributed by the auctioneer. This catalogue is a list of all the fruit offered by the firm for that day's auction, and is so drawn up as to provide space for a buyer's notes, such as the quality of, and the price he might be prepared to bid for, any particular lot. This catalogue also shows the name of the principals or owners of the fruit. At the appointed hour the buyers assemble in the auctioneers' rooms where the sales are made.

At these auction sales the lots offered comprise any number of boxes or packages, and as a general rule the fruit is bought by jobbers. The jobbers also buy in quantities from original carlot receivers other than auctioneers and from the jobbers the fruit passes to the retailers and into consumption.

The names of importers and auction firms are available for interested Canadian firms at the Commercial Intelligence Branch, Department of Trade and Commerce, Ottawa (refer to file No. 26348).

REPRESENTATION, SELLING AND CREDIT CONDITIONS IN CHILE

Trade Commissioner B. S. Webb

The subjoined is from the report which Mr. B. S. Webb, Canadian Trade Commissioner in Buenos Aires, has prepared as a result of a special visit to Chile on behalf of the extension of Canadian trade in that Republic. The section detailing the import market in Chile has already been published in Nos. 990-993 and 995 of this journal, and a report on Economic Conditions was published in No. 994. The completed report is about to be put in the hands of the printers, and in its pamphlet form will include the sections that have already been published in the Commercial Intelligence Journal.

In Argentina the manufacturers of all countries compete, through their local representatives, for the privilege of supplying the Argentine importer with his requirements and a signed order is handed by the importer to the local representative for transmission to the successful manufacturer, who ships the goods and invoices them direct to the importer. Argentina can in this sense be described as an open market, but the same cannot be said of Chile. The Chilian market is not an open market, nor an indent market, but is essentially a merchant market. Most of the import trade of the republic is in the hands of a small group of large English and American merchant houses who have been trading on the coast of South America for many years. Some of these houses have been established there for over a century, and several have done business there for fifty years or more without any serious disturbances; it would not be surprising therefore if some of them have come to regard the Chilian market somewhat in the light of a preserve. However this may be, there can be no question that, possessed of ample capital, with buying houses in London and New York, and operating distributing systems covering the whole length of the coast with an intimate knowledge of the market and its peculiarities derived from many years of experience, they are splendidly well organized and equipped for selling goods in Chile.

THE BRITISH MERCHANT HOUSES

British manufacturers have always held a predominating position in the Chilian market. Direct steamship communication has existed between Valpa-

raiso and Liverpool for over sixty years, the Pacific Steam Navigation Company having inaugurated its service via the Straits of Magellan in 1862. Shortly afterwards Liverpool merchants commenced to open branch houses in Chile, and for many years the market was almost an English monopoly. The system followed by the English merchant houses in those days was to send the goods which the market required to Valparaiso for stocking and distribution amongst local dealers all over the republic. Later on with the development of the nitrate industry in the north and agriculture in the south, branches were opened at towns in these zones, these branches being dependent on the chief Chilian offices at Valparaiso. Placing stocks of goods at the dealers' doors in this way had the effect of discouraging direct communication between the local dealer, however large, and foreign manufacturers. With the advent of modern agricultural machinery, the cash register, the typewriter, and other specialties not made to advantage in England, the English merchants, evidently realizing the advisability of adapting themselves to changing conditions, commenced to handle a certain number of American and German-made goods and a number of them opened buying offices in New York city for the purchase of those commodities which could best be obtained from the United States. Just what percentage of the trade of Chile is in the hands of British merchant houses is not easy to ascertain, but a number of opinions expressed lead to the assumption that the merchant houses do about 70 per cent of the trade in the particular lines which they handle. Their principle lines are textiles, piece goods, agricultural machinery, industrial machinery, engines, piping, wire, and construction materials.

It is not surprising therefore that so many English and American manufacturers of saleable products, after even a cursory glance over the territory, have been content to place their products in the hands of these old-established houses rather than to undertake the comparatively laborious task of working up a trade by selling to the Chilian importer and consumer through a selling organization of their own or through a local representative. The advantages of selling goods in Chile through the existing merchant houses are, of course, immediately apparent, the principal one being the entire elimination of risk of loss from bad debts, the merchant houses being not only willing but actually preferring to pay cash in New York or London (in return for the usual discount).

The disadvantage of selling goods in Chile through established merchant houses, however, are many and possibly are more than sufficient to outweigh the single advantage of cash payment in New York. In the first place, two or three American concerns excepted, all the merchant houses are typically English and, naturally enough, as such they are principally interested in selling English goods, the same principle being true in connection with the American houses and, even if this preference did not exist, it is obvious that a Canadian manufacturer in order to interest them to the extent of changing over from their old sources of supply, would have to offer very substantial advantages in point of price, quality and deliveries. In fact, the more one examines the conditions of trade in Chile and other South American markets, the stronger becomes the conviction that Canadian manufacturers cannot reasonably expect ever to build up a substantial and permanent export trade through the medium of English or American distributing channels.

LOCAL REPRESENTATION

A number of American manufacturing and exporting concerns during recent years have attempted to establish a trade with Chilian importers for their own account, and in almost every case the result has been the incurring of losses to such an extent that a thoughtful and exceptionally well-informed American business man is inclined to believe that the representative of American manufacturers, or at least those of them who have not already done so, would

do well to pack up and return to the States leaving those Chilian importers who require American goods to come to the States and pay for them before taking delivery and leaving the trade in those goods which are not American specialties to the merchant houses. This, of course, is an extreme view and observation, confirmed by actual experience, goes to show that it is by no means impossible for Canadian-made goods to be sold in Chile through the medium of manufacturers' representatives. The following are the commodities which can be sold in Chile in fair quantities through resident local representatives: hardware, paper, newsprint, government supplies, materials for government works and waterworks, mining and mineral requirements, belting, asbestos, industrial machinery, industrial chemicals, wire, electrical material, calcium carbide and binder twine.

DIRECT SELLING

It is of course possible that certain limited quantities of goods could be sold to Chilian importers direct—that is to say by correspondence or on samples —but in all but a few exceptional cases the idea of selling direct must be abandoned as, even if a few sales were to be made, the risk of losses resulting from bad debts or from claims would, in the absence of a representative, be too great to be lightly assumed.

In resumen the study of market conditions in Chile leads to the conclusion that, for Canadian exporters, the only two methods of doing business there are (1) through a resident English-speaking manufacturers' representative whenever possible; and (2) failing this, through the New York or London offices of the English and American merchant houses. Being an admittedly difficult market to enter, however, desultory methods should be discarded and intensive ones adopted. Current credit conditions as applied to the manufacturer's particular line should be studied and the manufacturer should decide either to meet them or to leave the market entirely alone. Consignment stocks should be supplied to a reliable agent when same are requested, consignment stocks making sales possible when the uncertainty of the exchange fluctuations makes c.i.f. business difficult or impossible to secure. In conclusion, it should be said that manufacturers who are interested in exporting to South American countries but who are as yet without actual experience, are not recommended to make a commencement in Chile. The Argentine and Brazilian markets are not only larger but are also much easier to enter, and a manufacturer unable to meet competition there could not reasonably hope for success in Chile. In the case of those who have been successful in exporting to other South American markets, however, there would appear to be no reason why they should not endeavour to extend their trade to include this, the third largest of the South American consuming markets.

THE TRAVELLING REPRESENTATIVE

Assuming that the Canadian manufacturer can send his own representative to cover the market in person, he should do so during the Chilian summer— that is from October to March inclusive. This procedure is so likely to be of ultimate value to the exporter that it is well worth favourable consideration. The cost is not particularly heavy in consideration of the distances involved; exclusive of transportation, 100 pesos Chilian per day is a fair average estimate, or approximately $15 Canadian at present exchange. Nor are there any great difficulties regarding the entry of samples or commercial travellers' licenses.

Time is a most important element and, in this respect, the representative should be allowed a free rein. It must be remembered by those who in their Canadian offices entertain a purely theoretical or conjectural knowledge of such a market as the Chilian, that conditions are in every respect different from those in Canada, and take no little time to appreciate adequately. The arrival

from Canada, whatever his prior qualifications may be, will find himself a little at sea for some weeks, and will only gradually become familiar, not only with business methods, ideas and traditions, but also with the innumerable minor factors connected with climate, character and personal habits which have a very definite, if subtle, effect on the market. A hasty visit is likely to give rise to all the lamentable results of half-knowledge; but to spend adequate time will prove a good economy, because it cannot fail to result in a vast amount of detailed and valuable information which no amount of correspondence could supply.

A knowledge of Spanish is desirable but not absolutely necessary, and it should certainly not be given too much weight in the selection of a traveller. Judgment, experience and receptiveness are far higher qualifications. True, it is an advantage, but it will generally be found that the majority of important business men are either Englishmen or Chilians who have been in England or the United States. In short, any conscientious and intelligent representative, granted sufficient time, will find that a visit to this market will not only place him in possession of practical information impossible to obtain otherwise, but will also enable him to choose a competent representative and spend a certain amount of time with him calling on the trade, thus leaving him in a most advantageous and knowledgeable position.

SECURING REPRESENTATION FROM CANADA

As it may not always happen that a Canadian manufacturer can afford the time and the expense involved in a visit to a South American market, it follows that in the majority of cases he will have to rely on outside assistance in the matter of securing a representative in Chile. In this connection it should be mentioned that the good offices of H.M. Consul-General at Valparaiso or H.M. Legation at Santiago are at the disposal of interested Canadians and that manufacturers can frequently get into touch with a suitable party through the British Chamber of Commerce at Valparaiso or through the Canadian Trade Commissioner's office at Buenos Aires.

In Chile, however, as in other South American Republics, there are a number of inefficient and usually unreliable and unscrupulous local representatives who are always on the lookout for new agencies. This class of individual is studiously avoided. Good and reliable manufacturers' representatives, on the other hand, are comparatively scarce and, when found, are usually occupied with as many or more agencies than they can properly handle. In selecting a manufacturers' representative reliability should be the first consideration and selling ability the second. Bank and mercantile agency reports on manufacturers' representatives are not usually of much value, as they concern themselves principally with his capital and financial standing, factors which are relatively unimportant when a reliable man is concerned.

CREDIT CONDITIONS

One of the most important questions which a manufacturer contemplating exporting to Chile will be called upon to consider is that of granting credits. Importers in Chile will probably be associated in the minds of the Canadian exporters with reports which they have read concerning huge stocks of American goods lying at South American ports consigned to the order of importers, who for no other reason than that of the exchange having moved against them had refused to purchase dollar drafts to pay for them. It is quite true that payment for certain quantities of American goods was refused during 1920-21 by Chilian importers, and that a portion of the rejected goods had to be sold by auction or otherwise disposed of for account of the exporters, but such an extraordinarily

rapid rise in the cost of American exchange as occurred in November, 1920, is not likely to occur again; and furthermore, for a proper understanding of that occurrence, a variety of circumstances and contributory causes which cannot be enumerated in this report would have to be taken into consideration in order to arrive at a sound conclusion regarding it. One of the contributory causes, according to a man whose business it is to study credit conditions in Chile, was the fact that a certain number of orders were turned into American manufacturers by some of the numerous travelling representatives who, obsessed with the idea of booking orders and failing to obtain them from importers of the first rank, were tempted to sell to second- and third-class concerns and even to accept orders from dealers and distributors not properly entitled to be classed as regular importers. At that time the credit information available to the principals was of the most meagre description, being usually limited to a report supplied verbally by a bank and transmitted by the representative together with the order. In the ordinary course of events the bank report would be slightly coloured in transmission according to the optimism and judgment or lack of judgment of the salesman concerned. Under these circumstances ninety days' terms were granted to firms not properly entitled to receive them, and goods were shipped cash against documents to importers who ought to have been asked to open a letter of credit. It is also suggested that amongst the rejected goods there were a number of consignments which had been shipped on orders placed mony months earlier at a time when the American dollar was at par and which the manufacturer, for reasons not always acceptable to the purchaser, had not shipped as per arrangement; many importers considered themselves justified in declining to pay, at a 50 per cent premium, for goods the delivery of which had been delayed to suit the exporter's convenience, and the statement is frequently heard that the position was brought about to a large extent by the action of manufacturers who, when the bottom fell out of the European market in the fall of 1920, remembered their South American clients and made hurried deliveries on orders which had been in hand for many months and the receipt of which in some cases had not even been acknowledged.

The above reference to the Chilian importers' version of the question of the rejected goods is included for the information of Canadian manufacturers who, very possibly, have up to now only heard the opposite or the exporters' side of the case, and because a wrong appreciation of the credit risk involved in shipping to South American Republics is detrimental to Canadian trade interests in so far as it may have the effect of causing manufacturers to classify all South American importing houses into one group of doubtful risks, whilst among them exist a considerable number of first-class concerns of unquestioned stability and integrity who might otherwise become valuable customers. A regrettable incident involving material loss to Canadian trade, and not a little loss of prestige, occurred in Santiago a short time ago as a result of a tendency to classify all Chilian importers as poor credit risks. A local manufacturers' representative applied for and secured the agency of an Ontario manufacturer of an automobile accessory, and after receiving prices and samples canvassed the trade and secured five or six orders from leading importing houses of the highest possible standing, including one British concern whose capital and reserves are almost unlimited. Terms of payment varied in each case according to the custom of the client, and the signed orders were duly forwarded only to be acknowledged by a letter in which the manufacturer regretted that, in view of the recent happenings in South American markets, etc., he would be compelled to ask customers to open a letter of credit in his favour in a New York bank. The standing of the importers in question was such that the representative could not afford to risk losing his customers' goodwill by confessing that his principals were not

willing to sell them on cash against documents terms and was forced to make excuses for the factory. The actual money value of the goods involved in a case like this may not in any one particular case amount to a very large sum, the regrettable part consisting not so much in the loss of perfectly sound business and an opportunity for entering the market as in the fact that a reputation may thus be acquired by Canadian exporters for being "not up to export trade." In practice it has been noticed that it usually takes a long time to get over the effects of an unfortunate commencement such as the one referred to, and that good opportunities not taken advantage of seldom repeat themselves.

Fortunately the position of a Canadian manufacturer called upon to decide a question of extending credit to a Chilian customer will not be so difficult as formerly might have been the case consequent on the initiative of Messrs. R. G. Dun & Co., who have recently opened branch offices at Santiago and Valparaiso, which have been in operation for some two years and now claim to have on file reports on the records of some 15,000 concerns in Chile. This number is constantly increasing and will include all firms engaged in the import and export business, and in the case of such firms an indication will probably be included in the report as to the terms on which goods might be sold to them as, for example, letter of credit, cash against documents, 60 or 90 days' sight, an open account, etc. Copies of these reports are systematically forwarded to the New York office, where they are kept on file and an independent and presumably fairly reliable report on any prospective Chilian customer is thus available to an interested manufacturer through the agency of the nearest Canadian branch of this information bureau. This report, combined with the information supplied by the local bank which should be forwarded with each order, and that obtainable from the firm's European and North American references, should provide sufficient material to enable the manufacturer to arrive at a fairly sound conclusion regarding the terms on which he may sell to the customer without incurring an undue risk of loss.

THE NEED FOR PROPAGANDA

It is emphatically apparent to the traveller in Chile that to the Chilian importer, Canada is almost an unknown country. He has never formulated clear or accurate ideas regarding the Dominion; he has a vague appreciation that it produces a remarkable quantity of wheat, is rather large, and remains covered with ice and snow for the greater part of the year. He is unable to discriminate between one city and another in point of size or importance; he has heard of Montreal, Quebec, Toronto and Winnipeg, but Moosomin means as much to him as Brantford, and he is just as likely to write to one as to the other should he seek industrial information. The manifest evidences of the existence and activities of the United States have clouded his vision to all that lies north of the line of the Great Lakes.

Unfeigned surprise was expressed at the stated figures of Canada's annual production, both agricultural and industrial—a surprise which was succeeded by immediate interest. But doubt still remained. "How can you ship?" was an almost invariable inquiry, seemingly prompted by a belief that Canadian transport facilities have remained undeveloped, and by ignorance of the fact that the United States ports are reached overnight from Canadian manufacturing centres. No Chilian merchants would question shipment from Chicago, but few realize that Toronto is closer to New York than the former. The activities of the ports of Montreal, Halifax, St. John or Vancouver seemed quite unappreciated. But that the Chilian importer will willingly turn to Canada for many manufactures is undoubted, granted a stimulated interest by intelligent propaganda. This is of course particularly true of the English houses, who in both

tradition and methods are essentially British if not imperialistic and, all else being equal, will trade with the Empire. In this respect Canadian firms have an undoubted advantage over United States competitors.

But advertisement is needed. It is not suggested that advertisement is a sure method of overcoming all the difficulties associated with breaking into a new market, but sound and valuable propaganda might be effected by means of trade journals, periodicals, and catalogues. The free distribution to the Union Club of Santiago, the Union Club of Valparaiso or the British Chamber of Commerce, Valparaiso, and other business men's organizations of such periodicals as the Canadian Manufacturers' Association *Trade Index, Heaton's Annual* and *Export Book*, the *Canadian Export Pioneer*, the *Shipping and Export Register of Canada, Hardware and Metal*, and a dozen of others would do much to bring Canada prominently and sympathetically into the mind of the Chilian importer, and could hardly fail to result in direct inquiries for Canadian products. Such publications as have already percolated into Chilian business circles have been productive of decided interest, but their incidence in Chile has so far been too spasmodic and limited to establish a definite appreciation of the productive capacity of the Dominion.

COMMERCIAL TRAVELLERS' REGISTRATION, LICENSES AND SAMPLES

Commercial travellers are required to register in the first Chilian town called at, if they intend to remain in the country ten days or longer. Registration in Valparaiso and other of the large towns is made at the "Oficina de Identificacion" (identification office) Licenses are required for each separate department visited, and are obtainable at the municipal offices of the chief town in the department. Fees, being cost of licenses, are payable at the following rates:—

$1,000 Chilian in each: Santiago, Valparaiso, Viña del Mar, Concepcion and Talcahuano.

$800 in each of the 65 departments having between 20,000 and 100,000 inhabitants.

$700 in each of the 11 departments having between 10,000 and 20,000 inhabitants.

$600 in each of the 4 departments having between 5,000 and 10,000 inhabitants.

The tax is payable half-yearly, and travellers intending to remain six months or less pay one half of the above-quoted sums.

Samples may be imported into the republic free of duty, provided they are re-exported within six months, and it is not necessary to re-export through the same port. Either the duty is deposited on entry or a security is given by a responsible resident house, and the cash deposited is refunded, or security returned upon presentation of a certificate from the Customs House, through which the samples are re-exported. Only salable samples must deposit duty. Samples travelling as baggage can be cleared in a few hours, but samples travelling as cargo may be delayed several weeks.

EXCESS POSTAGE ON LETTERS TO CUBA

Mr. J. L. Gonzolaz-Hoyuela, office of the Canadian Trade Commissioner, Havana, Cuba, writes that many letters are received in the office in Havana from Canadian firms on which there is an excess of postage, a ten cent stamp being frequently affixed. It should be noted that the letter postage from Canada to Cuba is four cents for the first ounce and three cents for each additional ounce.

TENDERS INVITED

New Zealand

Copies of plans and specifications have been received from Mr. W. A. Beddoe, Canadian Trade Commissioner at Auckland, for equipment for the Post and Telegraph Department, and the Public Works Department, Wellington. These specifications are open for inspection at the Department of Trade and Commerce, Ottawa. Tenders should be addressed to the Stores Manager, Post and Telegraph Department, and the Secretary, Public Works Supplies and Tenders Committee, Wellington, in accordance with these specifications.

No.	Date of Closing.	Particulars.
C.S. 178/ 362	May 23, 1923	*Post and Telegraph Department.*—3,000 yards canvas, 72 inch duck army tent.
P.W.D. 56611	June 24, 1923	*Public Works Department.*—Two 30 ft. deck plate girder spans. Nineteen 60 ft. deck plate girder spans.
P.W.D. 50325.	July 17, 1923	*Public Works Department.*—Contract includes constructing a road bridge of nine spans of nominally 60 ft. each, with 12 ft. roadway, carried on reinforced concrete cylinder piers and mass concrete abutments, and all other works indicated, described or implied on any of the plans, sections, drawings or in the General Conditions and the specifications, in accordance therewith, and the maintenance of same in good and sufficient repair for the period specified. in the General Conditions and the specifications, in accordance therewith, and

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain.	†*Berengaria*	New York	May 15
" " "	†*Paris*	New York	" 16
" " "	*Montlaurier*	Quebec	" 18
" " "	*Megantic*	Montreal	" 19
" " "	†*Aquitania*	New York	" 22
" " "	-*Melita*	Montreal	" 23
" " "	†*France*	New York	" 23
" " "	*Montclare*	Montreal	" 25
" " "	*Empress of Britain*	Quebec	" 26
Ireland only	‡*Marburn*	Montreal	" 24
France	**Andania*	Montreal	" 19
Union of South Africa	**Benguela*	Montreal	" 15
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela	*Chaleur*	Halifax	" 25
Bermuda, Bahamas, Jamaica, Colombia, British Honduras	**Can. Fisher*	Montreal	" 24
Cuba, Jamaica, and Colombia	**Andalusia*	Halifax	" 24
Argentine Republic	**Hesperia*	Montreal	" 20
China and Japan	*President Jackson*	Victoria	" 14
" " "	*Empress of Russia*	Vancouver	" 17
" " "	*Arabia Maru*	Victoria	" 22
" " "	*President Jefferson*	Victoria	" 26
Australia and New Zealand	‡*Tahiti*	San Francisco	" 18
Australia only	‡*Ventura*	San Francisco	" 29

† Letter mail only. * Parcel post and specially addressed correspondence only.

‡ Letter and Paper mail only - Papers, Parcel Post and specially addressed correspondence only.

NOTE.—The *Melita* and *Empress of Britain* will also be used for direct mail for the continent including direct Parcel Post to France.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING MAY 1, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement of the nominal closing quotations for all the principal exchanges for the week ending May 1, 1923. Those for the week ending April 24 are also given for the sake of comparison.

		Parity	Week ending April 24, 1923	Week ending May 1, 1923
Britain £	1.00	$4.86	$4.7341	$4.7288
France Fr.	1.	.193	.0687	.0687
Italy Lire	1.	.193	.0504	.0499
Holland Florin	1.	.402	.3987	.3986
Belgium Fr.	1.	.193	.0596	.0592
Spain Pes.	1.	.193	.1564	.1562
Portugal Esc.	1.	1.08	.0458	.0458
Switzerland Fr.	1.	.193	.1855	.1847
Germany Mk.	1.	.238	.000033	.000033
Greece Dr	1.	.193	.0127	.0122
Norway Kr.	1.	.268	.1809	.1754
Sweden Kr.	1.	.268	.2723	.2727
Denmark Kr.	1.	.268	.1922	.1903
Japan Yen	1.	.498	.4961	.4996
India R.	1.	2s.	.3209	.3224
United States $	1.	$1.00	1.0187	1.0196
Mexico $	1.	.498	.4951	.4970
Argentina Pes.	1.	.424	.3731	.3721
Brazil Mil.	1.	.324	.1107	.1108
Roumania Lei	1.	.198	....	....
Jamaica £	1.	4.86	4.7341	4.7453
British Guiana $	1.	1.		
Barbados $	1.	1.		
Trinidad $	1.	1.		
Dominica $	1.	1.		
Grenada $	1.	1.	.9837—.9843	.9814—9820
St. Kitts $	1.	1.		
St. Lucia $	1.	1.		
St. Vincent $	1.	1.		
Tobago $	1.	1.		
Shanghai, China Tael	1.	.708	.7687	.7749
Batavia, Java Guilder	1.	.402	.3960	.3925
Singapore, Straits Settlements $	1.	.567	.5654	.5608

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Quebec, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1555-1561.—Seven established firms in Jamaica desire to take up representation or selling agencies for Canadian flour.

1562. Flour.—Well-established agent in Singapore would like to receive samples and c.i.f. quotations.

1563. Representation of Canadian Flour Mill.—A large important firm in Holland are desirous of representing a good Canadian flour mill for first clear, export patent and patent.

1564. Butter and Cheese.—A commission agent in Barbados would like to get in touch with Canadian suppliers of butter and cheese for the Barbados market.

1565. Cheese.—The Glasgow branch of a large high-class firm of Irish importers of butter, cheese and eggs, with head office in Limerick, and many depots and agencies throughout England and Scotland, desires to form a connection with a first-class firm of cheese exporters in Canada.

1566. Rolled Oats and Cornmeal.—A commission agent in Barbados would either be willing to purchase direct or do business on a commission basis in rolled oats and cornmeal.

1567. General Feedstuffs.—A commission agent in Barbodos desires to obtain Canadian connections for general feedstuffs, either on a commission basis or direct.

1568. Packing House Products.—A commission agent in Barbados is desirous of obtaining a Canadian connection for packing house products.

1569. Hay and Oats.—A firm of commission merchants established in Havana desire to represent in the Cuban market, on a brokerage or commission basis, Canadian exporters of hay and oats.

1570. Chocolate Creams.—A commission agent in Barbados in good standing would like to get in touch with a Canadian exporter of chocolate creams in pails of about 10 pounds.

1571. Provision Goods.—A firm of commission agents in Georgetown, Demerara, with head office in Trinidad, desire to establish connections with Canadian provision houses who may require a representative in Trinidad and Demerara.

1572. Linseed and Linseed Oil.—A firm in Milan would be willing to import from Canada.

1573. Mineral Oils.—A firm in Naples desire to import mineral oils from Canada.

1574. Canned Fruits.—European commission house in Singapore would like to have c.i.f. quotations and samples of canned fruits.

1575. Jams.—An active English agent in Singapore desires to be put in touch with exporters of jam. Packing in 1-pound and 2-pound bottles, not in tins. C.i.f. quotations with samples.

Miscellaneous

1576. Chemical Products for Industrial Purposes, Soda and Paraffin.—A Milan firm would like to import from Canada.

1577. Chemicals and Pharmaceutical Specialties.—The foregoing are requested by a Milan firm anxious to open up a business relation with Canada.

1578. Chemicals for Agricultural Purposes and derivative industries, phosphates, sulphate of ammonia, nitrate of soda, copper sulphate, sulphuric acid, carbonate of magnesia and similar products are requested by a Milan firm.

1579. Chemicals, Woollen, Cotton Textiles and Shreds are requested by an Italian firm.

1580. Oils and Iron Ore.—A Glasgow engineer, exporter and buying agent is prepared to take up an agency or act as importer of Canadian iron ore and Canadian oils.

1581. Lubricating Oil.—A Milan house would like to hear from Canadian exporters of lubricating oil.

1582. Oils and Industrial Products.—A firm in Rome dealing in the foregoing are anxious to get in touch with Canadian firms willing to open up business connections with Italy.

1583. Asbestos Sheet.—A first-class English agent in Singapore could handle 1,000 yards of asbestos sheeting per month. Thicknesses required $\frac{5}{32}$-inch and $\frac{3}{16}$-inch, prices c.i.f. 75 cents and $1.25 per yard respectively, Straits currency in both cases.

1584. Glucose and Cornstarch.—An importer of heavy chemicals and foodstuffs in Mexico City is in the market for glucose and cornstarch, and desires to receive quotations for same from Canadian sources. Correspondence in English.

1585. Silk Hose.—Canadian in Singapore desires to represent Canadian manufacturer of women's silk hose. Samples and c.i.f. prices.

1586. Women's Cotton Undervests and Bloomers.—A Sydney firm with branches throughout the Commonwealth and New Zealand desire to hear from Canadian manufacturers of the above articles with a view to purchasing in the ordinary way or acting as agents for Australia and New Zealand.

1587. Dyestuffs.—A Milan company wish to be put in touch with Canadian exporters of dyestuffs.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From Montreal

To Avonmouth.—Welshman, White Star-Dominion Line, May 12; Caledonian, White Star-Dominion Line, May 19; Irishman, White Star-Dominion Line, May 26.

To Cardiff and Swansea.—Canadian Mariner, May 18; Canadian Explorer, June 1—both of the Canadian Government Merchant Marine.

To Glasgow.—Marvale, Canadian Pacific Steamships, Ltd., May 10; Saturnia, Anchor-Donaldson Line, May 11; Cassandra, Anchor-Donaldson Line, May 17.

To Hull.—Ariano, Furness Line, May 8; Comino, Furness Line, May 22.

To Liverpool.—Montrose, Canadian Pacific Steamships, Ltd., May 11; Kastalia, Cunard Line, May 11; Regina, White Star Line, May 12; Coracero, Cunard Line, May 31; Montlaurier, Canadian Pacific Steamships, Ltd., May 18; Megantic, White Star-Dominion Line, May 19; Montclare, Canadian Pacific Steamships, Ltd., May 25; Irishman, White Star-Dominion Line, May 26.

To London.—Brecon, Canadian Pacific Steamships, Ltd., May 12; Virgilia, Cunard Line, May 12; Welland County, I.C. Transports, Ltd., May 15; Canadian Victor, Canadian Government Merchant Marine, Ltd., May 9; Bothwell, Canadian Pacific Steamships, Ltd., May 19; Andonia, Cunard Line, May 19; Canadian Commander, Canadian Government Merchant Marine, Ltd., May 23.

To London and Antwerp.—Canadian Victor, May 9; Canadian Commander, May 23; Canadian Planter, June 6—all of the Canadian Government Merchant Marine, Ltd.; Lord Dufferin, I.C. Transports, Ltd., May 28.

To Manchester.—Manchester Regiment, May 10; Manchester Shipper, May 17; Manchester Division, May 24; Manchester Brigade, May 31; Manchester Hero, June 7—all of the Manchester Lines, Ltd.

To Newcastle and Leith.—Cairntorr, May 11; Cairnavon, May 11; Cairnmona, May 25—all of the Thomson Line.

To Southampton.—Minnedosa, Canadian Pacific Steamships, Ltd., May 9; Melita, Canadian Pacific Steamships, Ltd., May 23; Empress of Scotland, Canadian Pacific Steamships, Ltd., May 12; Empress of Britain, Canadian Pacific Steamships, Ltd., May 28.

To Belfast.—Rathline Head, May 25; Torr Head, May 31—both of the Head Line.

To Cork.—Carrigan Head, Head Line, May 30.

To Dublin.—Melmore Head, Head Line, May 23.

To Norwegian Ports.—Idefjord, May 19; Trondkilmsfjord, May 19—both of the Norwegian-American Line.

To Rotterdam and Hamburg.—Essex County, I.C. Transports, Ltd., May 23; Seattle Spirit, Rogers & Webb, May 24; Kenbane Head, Head Line, May 30.

To Hamburg.—Empress of Scotland, Canadian Pacific Steamships, Ltd., May 12; Essex County, I.C. Transports Ltd., May 23; Seattle Spirit, Rogers & Webb, May 24; Kenbane Head, Head Line, May 30.

To Copenhagen.—Pennsylvania, Scandinavian-American Line, about May 20; Arkansas, Scandinavian-American Line, about June 20.

To Copenhagen, Gothenburg, Christiania, Helsingfors and Other Scandinavian and Baltic Ports.—Hickman, Sprague Lines, May 15; Aledo, Sprague Lines, June 15; Pennsylvania, Scandinavian-American Line, May 20.

To Antwerp.—Minnedosa, Canadian Pacific Steamships, Ltd., May 9; Canadian Victor, Canadian Government Merchant Marine, Ltd., May 9; Canadian Commander, Canadian Government Merchant Marine, Ltd., May 23; Melita, Canadian Pacific Steamships, Ltd., May 23; Brecon, Canadian Pacific Steamships, Ltd., May 30.

To Havre.—Welland County, I.C. Transports, Ltd., May 15; Essex County, I.C. Transports, Ltd., May 20; Lisgar County, I.C. Transports, Ltd., May 27.

To South African Ports.—Benguela, Elder-Dempster Line, May 15.

To New Zealand and Australia.—Atholl, New Zealand SS. Co., May 10; Waimate, New Zealand SS. Co., May 20 (to Australia only); Canadian Pioneer, May 26; Canadian Cruiser, June 26—both of the Canadian Government Merchant Marine, Ltd.

To Bermuda, Barbados, Trinidad and Demerara.—Berwyn, Canadian Pacific Steamships, Ltd., May 8; Bedwyn, Canadian Pacific Steamships, Ltd., May 23—both via Sydney, N.S.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—Canadian Carrier, May 16; Canadian Fisher, May 24—both of the Canadian Government Merchant Marine.

To St. Kitts, Antigua, Barbados, Trinidad and Demerara.—Canadian Carrier, May 16; Canadian Otter, May 30—both of the Canadian Government Merchant Marine.

To St. John's (Nfld.), via Charlottetown.—Canadian Sapper, Canadian Government Merchant Marine, May 26 and June 16.

To St. John's (Nfld.).—Canadian Sapper, Canadian Government Merchant Marine, May 10 and 26; Mons, Newfoundland Shipping and Trading Company, May 5, and fortnightly sailings.

From Quebec

To Liverpool.—Montlaurier, Canadian Pacific Steamships, Ltd., May 18; Canada, May 12; Megantic, May 19; Irishman, May 26—all of the White Star-Dominion Line.

To Southampton.—Empress of Scotland, Canadian Pacific Steamships, Ltd., May 12; Empress of Britain, Canadian Pacific Steamships, Ltd., May 26.

To Hamburg.—Empress of Scotland, Canadian Pacific Steamships, Ltd., May 12.

To Cherbourg.—Empress of Britain, Canadian Pacific Steamships, Ltd., May 26.

From Halifax

To Liverpool (via Newfoundland).—Sacha, Furness, Withy & Co., Ltd., May 14.

To Bermuda, St. Kitts, Antigua, Montserrat, Dominica, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad and British Guiana.—Royal Mail Steam Packet Co., May 11 and every fortnight.

From St. John

To Rio de Janeiro, Santos, Montevideo and Buenos Aires.—Hesperia, Houston Line, May 25.

From North Sydney, N.S.

To Newfoundland.—Kyle, Newfoundland Government Railway Commission, tri-weekly (Tuesday, Thursday and Saturday).

From Vancouver

To Yokohama, Kobe and Nagasaki.—Arabia Maru, Osaka Shosen Kaisha, May 12; Arizona Maru, Osaka Shosen Kaisha, May 18.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Empress of Russia, Canadian Pacific Steamships, Ltd., May 17; Yokohama Maru, Nippon Yusen Kaisha, May 17.

To Yokohama, Kobe, Shanghai and Hong Kong.—President Jackson, Admiral Oriental Line, May 14; Empress of Australia, Canadian Pacific Steamships, Ltd., May 31.

To Yokohama, Kobe and Moji.—Arabia Maru, Osaka Shosen Kaisha, May 12.

To Yokohama and Kobe.—Toyooka Maru, Nippon Yusen Kaisha, May 31; Toyooka Maru, Nippon Yusen Kaisha, June 2; Toyama Maru, Nippon Yusen Kaisha, June 20.

To Yokohama, Kobe and Shanghai.—Canadian Prospector, Canadian Government Merchant Marine, May 30; Canadian Transporter, Canadian Government Merchant Marine, June 30.

To Yokohama, Kobe, Hong Kong and Manila.—Tyndareus, Blue Funnel Line, May 26; Protesilaus, Blue Funnel Line, June 14; Achilles, Blue Funnel Line, July 12.

To Yokohama, Kobe, Moji and Shanghai.—Arabia Maru, Osaka Shosen Kaisha, May 12; Manila Maru, Osaka Shosen Kaisha, June 6.

To Yokohama, Kobe, Moji, Dairen, Shanghai and Hong Kong.—Arizona Maru, Osaka Shosen Kaisha, May 21.

To India.—Canadian Winner, Canadian Government Merchant Marine, June 20.

To Auckland, Melbourne and Sydney.—Hauraki, Canadian-Australasian Royal Mail Line, May 21; Waiotapu, first week in June.

To Auckland, Sydney, Melbourne and Adelaide.—Canadian Traveller, Canadian Government Merchant Marine, May 25; Canadian Scottish, Canadian Government Merchant Marine, June 20.

To Honolulu, Suva, Auckland and Sydney.—Niagara, Canadian-Australasian Royal Mail Line, June 1.

To Napier, New Plymouth, Lyttleton and Dunedin.—Waihemo, Canadian-Australasian Line, May 21.

To Liverpool, London, Rotterdam and Antwerp.—Loch Katrine, Royal Mail Steam Packet Co., second half of May.

To Rotterdam, London and Antwerp.—Drechtydyk, Royal Mail Steam Packet Co., first half of June.

To Supe, Chicama, Callao, Mollendo, Arica, Guayaquil and Corinto.—Regulus, Latin-American Line, about May 25.

To Salina Cruz, San Jose de Guatamala, Balboa, Amapala, Corinto, and such other ports as cargo inducements offer.—Senaloa, Latin-American Line, May 20.

To Manchester (via Panama Canal).—Howick Hall, Manchester Lines, Ltd., June 6.

From Victoria

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Australia, Canadian Pacific Steamships, Ltd., May 31.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Yokohama Maru, Nippon Yusen Kaisha, May 16; Empress of Russa, Canadian Pacific Steamships, Ltd., May 17; Kaga Maru, Nippon Yusen Kaisha, June 12; Iyo Maru, Nippon Yusen Kaisha, June 30; Shidzuoka Maru, Nippon Yusen Kaisha, July 16.

To Honolulu, Suva, Auckland and Sydney.—Niagara, Canadian-Australasian Royal Mail Line, June 2.

To Yokohama, Kobe, Shanghai, Hong Kong and Manila.—President Jefferson, Admiral Oriental Line, May 26; President Grant, Admiral Oriental Line, June 7.

To Yokohama, Kobe, Moji, Dairen, Shanghai, Manila and Hong Kong.—Arabia Maru, Osaka Shosen Kaisha, May 22.

To Manila (via Oriental Ports).—Admiral, Pacific Steamship Company, every twelve days, May 2, etc.

To Yokohama, Kobe, Nagasaki, Shanghai, Manila and Hong Kong.—Yokohama Maru, Nippon Yusen Kaisha, May 16.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Kaga Maru, June 12; Iyo Maru, June 30—both of the Nippon Yusen Kaisha.

DIRECTORY OF CANADIAN EXPORTERS

The Department of Trade and Commerce maintains a Directory of Canadian Exporters in the form of a card index system divided into two sections—commodity and history. In the former are listed under commodity headings the names of all Canadian firms of whom the department has knowledge as being in a position to export these commodities. In the latter are listed the names of firms and the commodities they export to various countries, with such other details as cable addresses, codes used, names of bankers, brands, credit ratings, and names of foreign representatives.

A duplicate of this directory is in possession of each Canadian Trade Commissioner abroad, and is kept up to date by periodical revision. By means of it the Trade Commissioners are able to bring to the attention of foreign importers the names of Canadian exporters able to supply their needs. It is hoped ultimately to furnish sets of the index to British Consular offices in those countries in which Canada has no representatives. It is therefore to the obvious advantage of Canadian firms engaged in export trade to have their names included in this Directory, and those who have not done so are urged to repair the omission by securing application blanks from the Director, Commercial Intelligence Service, Ottawa.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

Lucien Pacaud, Secretary to the Office of the High Commissioner for Canada in London, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada and Newfoundland, 285 Beaver Hall Hill, Montreal, Que.

The British Trade Commissioner (for Ontario), 24 Adelaide St. W., Toronto, Ont.

The British Trade Commissioner (for the Prairie Provinces and British Columbia), 703 Union Bank Building, Winnipeg.

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address Canadian.*

Australia

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil

E. L. McColl. Address for letters—Caixa Postal 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China

J. W. Ross. Address for letters—P.O. Box 300. Office—Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba

Address: 400 and 401 Teniente Rey 11, Havana. (Post Office Box 1290.) *Cable Address, Cantracom.*

France

Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland

Norman D. Johnston, Zuidblaak 26, Rotterdam, *Cable Address, Watermill.*

India and Ceylon

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico

C. Noel Wilde. Address for letters, Apartado Num. 126 bis, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian.*

New Zealand

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements

A. B. Muddiman, P.O. Box 121, Singapore. (Territory covers Straits Settlements. British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

Douglas S. Cole, Acting Trade Commissioner, Sun Building, Clare street, Bristol. *Cable Address, Canadian.*

Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States

Frederic Hudd, 44 Whitehall street, New York City. *Cable Address, Cantracom.*

Trade Commissioner P. W. Ward, formerly of Singapore, is at present temporarily attached to headquarters at Ottawa.

CANADIAN COMMERCIAL AGENTS

Australia

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark

C. E. Sontum, Grubbegd, N. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

Vol. XXVIII May 12, 1923 No. 1006

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

Printed by F. A. ACLAND, Printer to the King's Most Excellent Majesty

TABLE OF CONTENTS

Commercial Intelligence Journal

Issued Every Saturday by the Department of Trade and Commerce

Ottawa **May 12, 1923** **1006**

BRITISH EMPIRE EXHIBITION

As already announced in the *Commercial Intelligence Journal,* plans for Canada's participation in the British Empire Exhibition to be held in Wembly Park, near London, England, from April 20 to October 31 next year, are practically completed.

Canada expects to have an exhibition worthy of its name. The Canadian Government exhibit will be under the direction of the Minister of Trade and Commerce, who for this purpose will have under his jurisdiction the staff of the Dominion Government Exhibition Commissioner.

This department therefore desires, as a preliminary announcement, to state that within the grounds of Wembly Park, where the great exhibition is to be held, will be constructed the Canadian Building. The Empire Exhibition Executive will also construct a special building to be used as a restaurant, in which products of the Empire only will be used, provided they can compete successfully in quality and price with similar foreign commodities.

It is anticipated that the exhibition will be visited by millions of people and a unique opportunity will thus be afforded for manufacturers and producers of foodstuffs throughout the Empire to advertise their products to the world.

Arrangements have not yet advanced sufficiently to permit of any detailed announcement, but it is desirable that it should be known among Canadian exporters of foodstuffs that the Department of Trade and Commerce is prepared in every possible way to assist Canadian suppliers of foodstuffs throughout the period of the exhibition. For this purpose it is suggested that firms interested, and who are not now represented in London or elsewhere in the United Kingdom, should arrange to appoint agents in London, to whom all information can be provided so that on short notice during the period of the Exhibition prices and supplies can be made available.

The Department of Trade and Commerce will provide a special officer detailed in London who will act as liaison officer between Canadian suppliers of foodstuffs and the authorities in charge of the restaurant.

Canadian firms, therefore, interested in supplying Canadian goods to the exhibition authorities, should communicate with The Deputy Minister, Department of Trade and Commerce, Ottawa, giving the names and addresses of their agents or jobbers in the United Kingdom and full information regarding the foodstuffs they can supply, so that arrangements may be made well in advance. The department will also welcome helpful suggestions.

TRADE COMMISSIONER J. E. RAY'S FORTHCOMING VISIT TO CANADA

Mr. J. E. Ray, Canadian Trade Commissioner in Manchester, sails from Liverpool on the 18th of May for Canada with a view to undertaking a tour of the Dominion on behalf of Canadian export trade in the Manchester district, the central and one of the most populous areas in the United Kingdom. Canadian firms who desire to be brought in touch with Mr. Ray or to interview him should communicate immediately with the Director, Commercial Intelligence Service, Ottawa, in order that the necessary arrangements may be made.

DIRECTORY OF CANADIAN EXPORTERS

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SUMMARY OF THE TRADE OF CANADA FOR MARCH, 1923

The summary of the trade of Canada for March, 1923, shows that as represented in dollars, imports for consumption were valued at $91,881,427 in March, 1923, as against $79,378,726 in March, 1922, and $92,600,655 in March, 1921. The imports from the United Kingdom in March, 1923, were valued at $15,319,331, as against $14,166,698 in March, 1922, and $16,407,700 in March, 1921. The imports from the United States in March, 1923, were valued at $63,268,176, as against $54,911,406 in March, 1922, and $63,775,792 in March, 1921. The total imports for the twelve months ending March, 1923, were valued at $802,465,043, as against $747,804,332 for the corresponding period in 1921-22, and $1,240,158,882 for the twelve months ending March, 1921.

The value of the exports of Canadian produce for the month of March, 1923, was $76,557,599, as against $59,539,313 for March, 1922, and $68,092,428 for March, 1921. The exports to the United Kingdom were valued at $17,249,152 in March, 1923, as compared with $19,944,183 in March, 1922, and $14,248,803 in March, 1921. The exports to the United States were valued at $38,928,918 during March, 1923, as against $25,743,941 in March, 1922, and $35,072,447 in the corresponding month of 1921. The value of the total exports of Canadian produce during the twelve months ending March, 1923, was $931,451,443, as against $740,240,680 for the corresponding period in 1921-22, and $1,189,163,701 for the twelve months ending March, 1921.

The month's returns show an unfavourable balance of trade of $15,323,828; the returns for the twelve months' period show a favourable balance of $128,986,400.

SUMMARY OF THE TRADE OF CANADA: MONTH AND TWELVE MONTHS ENDING MARCH, 1923

(Compiled by External Trade Branch, Dominion Bureau of Statistics)

Main Groups	Month of March, 1923			Twelve Months ending March, 1923		
	Total Imports	From United Kingdom	From United States	Total Imports	From United Kingdom	From United States
Imports for Consumption	$	$	$	$	$	$
Agricultural and Vegetable Products	18,224,509	2,628,843	8,308,253	161,669,784	26,666,163	73,049,546
Animal Products	5,712,406	528,643	4,105,888	46,736,774	3,143,223	34,812,367
Fibres and Textile Products	20,462,144	8,616,451	9,026,461	170,146,958	69,339,824	77,285,998
Wood, Wood Products and Paper	3,789,276	255,981	3,371,311	35,845,544	2,708,338	31,841,957
Iron and its Products	16,832,382	1,185,499	15,527,068	138,724,455	12,671,433	124,371,885
Non-Ferrous Metal Products	4,143,958	464,666	3,471,467	37,492,604	3,595,638	31,791,237
Non-Metallic Mineral Products	15,703,962	666,893	14,203,626	139,919,012	12,508,655	114,641,860
Chemicals and Allied Products	2,909,325	356,612	2,143,404	25,793,101	3,636,013	18,347,545
All other Commodities	4,103,465	615,743	3,110,698	46,136,811	7,018,384	34,775,037
Total Imports, 1923	91,881,427	15,319,331	63,268,176	802,465,043	141,287,671	540,917,432
1922	79,378,726	14,166,698	54,911,406	747,804,332	117,135,343	515,958 196
1921	92,600,655	16,407,700	63,775,792	1,240,158,882	213,973,562	856,176,820
	Total Exports	To United Kingdom	To United States	Total Exports	To United Kingdom	To United States
Exports (Canadian Produce)	$	$	$	$	$	$
Agricultural and Vegetable Products	22,664,938	10,653,894	1,059,814	407,760,092	268,828,862	41,891,873
Animal Products	8,919,439	3,120,338	4,352,311	135,841,642	64,628,261	55,225,166
Fibres and Textile Products	904,796	89,184	619,733	7,850,843	1,077,976	4,432,757
Wood, Wood Products and Paper	24,695,813	848,049	22,143,819	228,756,205	19,834,368	191,363,061
Iron and its Products	7,105,765	1,106,159	1,453,461	51,137,912	11,556,627	9,409,265
Non-Ferrous Metal Products	5,594,567	633,132	3,821,816	44,358,037	8,107,032	27,889,699
Non-Metallic Mineral Products	3,636,711	186,124	2,829,443	27,646,704	728,674	20,817,688
Chemicals and Allied Products	1,820,771	270,474	1,005,995	14,046,940	1,984,441	7,951,543
All other Commodities	1,214,799	341,798	742,526	14,053,068	2,321,204	10,099,156
Total Exports, 1923	76,557,599	17,249,152	38,928,918	931,451,443	379,067,445	369,080,218
1922	59,539,313	19,944,183	25,743,941	740,240,680	299,361,675	292,588,643
1921	68,092,428	14,248,803	35,072,447	1,189,163,701	312,844,871	542,322,967
Exports (Foreign Produce)						
Totals, 1923	1,229,076	69,711	1,009,186	13,844,394	851,081	11,267,503
1922	1,308,181	60,066	1,076,780	13,686,329	1,001,518	11,515,534
1921	1,375,447	55,158	1,116,638	21,264,418	1,383,800	18,378,969

EXPORTS OF CANADIAN PRODUCE TO THE UNITED STATES DURING SIX MONTHS UNDER THE NEW TARIFF

The following statement shows the volume of Canadian exports to the United States during the first six months following the adoption of the new United States tariff on September 22, 1922, as compared with exports during the corresponding six months of the two preceding years. The statistics were compiled by the External Trade Branch of the Dominion Bureau of Statistics. (See *Commercial Intelligence Journal* No. 974, September 30, 1922, for article on new tariff).

	Six Months ended March 31		
	1921	1922	1923
Agricultural and Vegetable Products—	$	$	$
A. Mainly Food....	103,894,873	18,746,649	16,528,622
B. Other than Food..	5,454,370	5,507,644	6,656,035
Animal Products..	38,987,937	27,156,279	27,823,932
Fibres, Textiles and Textile Products..	3,347,429	838,728	2,312,164
Wood, Wood Products and Paper..	96,807,559	78,467,174	104,142,174
Iron and its Products..	5,863,249	2,223,312	5,614,005
Non-Ferrous Metal Products..	12,937,130	7,969,923	18,205,153
Non-Metallic Mineral Products..	9,443,026	6,830,568	12,150,650
Chemicals and Allied Products..	6,225,951	3,071,363	4,080,567
Miscellaneous Commodities..	6,406,882	3,870,035	4,410,811
Total Exports..	289,368,406	154,681,675	201,924,113

ECONOMIC SITUATION IN GERMANY

Trade Commissioner L. D. Wilgress

Hamburg, April 10, 1923.—In contrast with previous months, there has been comparatively little change during March in the general economic position in Germany. The consequences of the French occupation of the Ruhr are being felt to an increasing extent each week, which is inevitable in view of the importance of this industrial area to the economic life of the country. The rate of exchange for the mark was remarkably steady during March at between 19,000 and 22,800 marks to the dollar. There was a general tendency for prices to fall, but this was more marked in the case of manufactured goods and imported products than in foodstuffs. Export trade continues to be restricted on account of the improved external value of the mark without corresponding decreases in German prices. As a result there has been an increase in unemployment, and in many industries factories are working on part time. Imports of coal from Great Britain are still being received at the rate of over 20,000 tons a day. The trade in other imported articles, however, is very quiet, and in view of the prevailing uncertainty German manufacturers are not contracting for large quantities of raw material. The shortage of working capital continues to be a prominent feature of all branches of trade in Germany.

STABILIZATION OF THE MARK

The efforts of the Reichsbank to regulate the exchange value of the mark must be regarded as having been so far very successful. Throughout the month of March the rate of exchange remained steady. At the beginning of the month the rate stood at 22,800 marks to the dollar and declined gradually until on March 8 the rate was 19,000 marks. There followed a rise to 20,800 marks, at around which the rate remained until the end of the month. The Government through the Reichsbank first intervened to support the exchange value of the mark about the middle of February. As this coincided with a natural reaction

from the heavy drop in the exchange during February, its task was facilitated. The result was that in a short time the exchange rate for the dollar fell from 50,000 marks to 22,000 marks. The Reichsbank states that the action has not caused any depletion in its holdings of foreign currency, as it has been able to buy back at lower rates the foreign values with which it parted. Moreover, the suspension of reparation payments enabled the Reichsbank to accumulate the necessary foreign exchange for the steps taken. On the other hand, the Reichsbank statement shows an increase of liabilities which are difficult to account for except by borrowings abroad.

THE GOLD LOAN

Part of the Government's policy for the regulation of the exchange value of the mark has been the issue of a gold loan of $50,000,000, guaranteed by the Reichsbank. It is now evident that this loan has not been a success, only about a quarter of the amount offered being subscribed by the public, and the banks, who had underwritten one-half the issue, being left with this amount on their hands. The amount subscribed must be considered disappointing in view of the large holdings in foreign currency of German nationals.

CONTINUED INFLATION

The results of the gold loan would appear to indicate that the German business world does not place much confidence in the efforts of the Government to stabilize the mark. These efforts in fact appear to be nullified by the continuance of currency inflation. The Reichsbank return for March 29 gave the total note circulation at 5,517,919,650,000 marks, an increase from the previous week of 562,234,770,000 marks. This is equivalent to an issue of 80,000,000,000 marks a day. A year ago the total note circulation stood at 123,000,000,000 marks. Last October the five hundred milliard figure was reached, and a thousand milliards were in circulation in December. At the end of January when the exchange rate was highest the total note circulation amounted to two thousand milliards. These figures illustrate the progressive inflation of the German currency during the past year and show that the issue of paper money has not yet been checked. The gold reserve of the Reichsbank has during this period remained practically constant at the equivalent of about $250,000,000. It is interesting to note, however, that whereas during most of last year the gold reserve was more than twice the gold value of the note circulation at the current rate of exchange, the present gold value of the note circulation is $253,000,000, or practically equivalent to the gold reserve.

The preliminary returns of the revenue and expenditure of the Federal Government during the financial year ending March 31, 1923, shows a deficit amounting to 6,329,200,000,000 marks. The loss on the railways alone was 2,042,000,000,000 marks. The total revenue from taxes, customs, etc., was 1,301,000,000,000 marks, or only a little more than half the deficit on the railways. The floating debt during the year therefore increased from 271,900,000,000 marks to 6,601,142,000,000 marks.

THE MARK AS A MEDIUM OF EXCHANGE

Reference is frequently made outside Germany to the various schemes adopted for counteracting the depreciation of the mark and the conclusion is deduced that these prove that the mark is losing its function as a medium of exchange. Thus the charcoal loan in Saxony, in which repayment of principal and interest is based on the current price of charcoal, and similar loans in different parts of the country, based on barley, coal or other products, are referred

to as indications of this tendency. It is also true that industrial firms pay their workers partly in foodstuffs and other necessities. It is a mistake, however, to exaggerate the conclusions to be derived from such measures, since, although the Government by the issue of a gold loan has virtually repudiated the mark, it still remains the chief medium of exchange for internal trade and there are no signs yet of any general repudiation of the paper currency. In fact, owing to the recent improvement in the exchange value of the mark and the losses entailed thereby, exporters of many articles are tending to give up quotations in foreign currencies in favour of mixed quotations in which the labour and other costs are quoted in marks and the raw materials in foreign currency plus the usual manufacturer's profit. There is also a constant shortage of ready cash which forces German firms to maintain large mark balances or holdings of notes. In spite of the inflation of the currency, therefore, it is premature to speak of the mark as having lost its function as the principal medium of exchange for transactions in Germany.

EFFECTS OF IMPROVED MARK

The consequences of the sudden improvement in the external value of the mark during February are still being experienced. When the exchange rate rose to nearly 50,000 marks to the dollar, prices were marked up accordingly. The subsequent action of the Reichsbank in forcing the rate down to 21,000 marks increased the external value of the mark above its internal value, since prices have not been reduced to anywhere near the corresponding extent. The result has been that German prices are no longer under the world level, and export trade is greatly restricted, while within Germany retail buying is reduced to a minimum, since every one is anticipating a further fall in prices. For the moment therefore trade is stagnant.

PRICE REDUCTIONS

In view of the increased external value of the mark, it is interesting to examine the extent to which there has been a decrease in German prices since the mark reached its highest level at the end of January. For this purpose the most reliable guide is the index number of wholesale prices published at the commencement of every month by the *Frankfurter Zeitung,* which is taken as authoritative not only in Germany but also abroad.

The *Frankfurter Zeitung* index number for the beginning of April shows that the fall in prices which commenced in February continued during March. The index number for 98 commodities decreased to 6,393 times that of 1914, as compared with 6,770 times at the beginning of March, and 7,159 times at the beginning of February. The reduction during March therefore amounted to 5·6 per cent as compared with 5·4 per cent during February. On the other hand the exchange rate for the dollar was 6 per cent less on the day of calculation in the beginning of April (April 6) than on the day of calculation in the preceding month.

During February there was a considerable divergence in the price fluctuations, some commodities or even groups of commodities showing considerable increases in price, whereas others showed decreases. In March there was a more marked tendency for prices to fall, though the prices of some articles again increased. The following table, taken from the *Frankfurter Zeitung,* gives the index number of wholesale prices by leading groups for January, 1920, 1921,

1922, and for the last six months as well as of the dollar exchange, each index being based on the middle of 1914:—

	Dollar Exchange	Group I Provisional	Group II Textiles Leather etc.	Group III Minerals	Group IV Miscellaneous.	Group V Finished Manufactured Products	General Index for 98 commodities
Middle, 1914..	1	1	1	1	1	1	1
January, 1920..	12	20	26	27	11	15	20
January, 1921..	18	20	23	28	18	17	21
January, 1922..	45	38	58	52	31	33	42
November, 1922..	1,488	890	1,539	1,290	720	577	945
December, 1922..	1,777	1,448	2,898	2,212	1,342	1,191	1,674
January, 1923..	2,045	1,758	3,206	2,622	1,778	1,518	2,054
February, 1923..	9,524	5,550	14,137	9,312	5,347	4,766	7,159
March, 1923..	5,381	5,361	9,450	3,298	6,949	5,514	6,770
April, 1923..	5,024	5,350	8,349	7,822	6,434	5,315	6.393

It will be noted that the index numbers of wholesale prices for the beginning of March and April are higher relatively to the dollar exchange than in previous months. Making allowance for the difference in world prices since 1914, it would appear that the internal value of the mark is now less than its external value.

PRICE FLUCTUATIONS BY COMMODITIES

The above journal points out that provisions were the only group of commodities which did not participate in the general fall in prices during March. Within this group the price of grain, excepting barley and maize, increased. There were also considerable increases in the price of eggs, sugar, meats, butter, and tobacco. In many cases the German prices of these products are now above the world level. Barley, potatoes, rice, lard, margarine, and coffee decreased in price during March.

The index for Group II, textiles, leather, etc., showed a decrease during February of 32·2 per cent and a further decrease during March of 11 per cent. Silk and imitation silk alone increased in price, while the prices of sole leather and cotton yarn remained unchanged. All other goods in this group showed more or less marked reductions in price.

In the minerals group coal, iron and all metals fell in price. In the miscellaneous group the prices of bricks, newsprint, and timber rose, while the prices of cement, fertilizers and methylated spirits remained unchanged. The remaining commodities in this group, particularly lubricating oil, petroleum, benzine, and firewood, decreased in price.

Group V, finished manufactured products, which showed a general increase of 15·6 per cent during February, decreased during March by 3·5 per cent. A large proportion of the commodities in this group remained unchanged in price. Motor-car tires, steam boilers, sheet metal products, writing tables, artificial horn buttons and string increased in price, while the prices for oil engines, belting, motor-cars without tires, tip wagons, shirts and boots and shoes fell.

The above review of the price fluctuations by commodities indicates that the chief decreases in prices have been in the case of manufactured articles or products more sensitive to world market prices, while in the case of most foodstuffs and other articles of general consumption there has been comparatively little change. The index number for retail prices at the beginning of April was 4,576 as compared with 4,458 for the previous month, an increase of 3 per cent; thus showing that the consumer has not yet begun to benefit to any great extent from the fall in prices.

MARKET FOR MANUFACTURES OF WOOD IN MANCHESTER DISTRICT

Trade Commissioner J. E. Ray

Manchester, April 25, 1923.—So frequently has the attention of Canadian manufacturers been drawn to the vast market for manufactures of wood existing in all parts of the United Kingdom, that the following notes on the subject may contain little that is new beyond a description of the present condition of supply and demand. However, no apology should be necessary for reiterating a theme still holding promise of substantial benefits to the woodturners of Canada. Of course, every one is familiar with the obstacles confronting Canadian manufacturers, such as the keenness of competition, the disparity between the freight rates from Canada and those from Scandinavia, the chief source of competition, and also the scarcity of certain woods indispensable to the manufacture of certain kinds of woodenware. But the obstacles are not so formidable as to be insurmountable. Canadian makers can get into the market on many lines by utilizing the latest machinery available, and by producing in such large quantities as will enable them to base their profits upon a much finer margin than is possible upon small and spasmodic shipments.

Various Manchester houses have for several years past imported manufactures of wood from Canada, such as washboards, clothes pins, mangle rollers, pails, churns, handles, fibre wood, blind rollers, dowels, skewers, etc., and success in these lines should encourage the woodturners to investigate the possibilities of extending their operations in other directions.

The following commodities are enumerated to illustrate a few of the articles of wood which the writer thinks worthy of reconsideration by Canadian manufacturers.

VARIOUS TOOL HANDLES

Hammer and Sledge.—These handles are usually made of hickory, the United States product being very popular. At the same time large quantities of hammer handles made of ash are in demand which range in size from 12 to 20 inches, and are sold wholesale at the present time at 12-inch, 1s. 4d. per dozen, rising upward from 1d. to 3d. per inch.

The sizes of the hickory sledge handles are 24-inch, 30-inch, 36-inch and 42-inch, the present landed price being 9s., 10s., 11s. and 13s. respectively per dozen.

Hay and Manure Fork.—These are invariably of ash, and are produced at home as well as being imported from the United States, and to a lesser degree from Sweden. The sizes of the former run in half feet from 4 feet to 8 feet with diameters 1⅜ inches, 1½ inches and 1⅝ inches. The sizes of the latter are 4 feet, 4½ feet and 5 feet, diameters 1½ inch. The c.i.f. prices of American hay forks are: 4 feet, 4s. 6d.; 4½ feet, 5s.; 5 feet, 5s. 9d.; 5½ feet, 6s. 3d.; and 6 feet, 7s. per dozen.

The hay fork handles are straight, while the manure fork handles may be straight or bent.

Rake and Hoe.—These handles are straight and range from 4 feet (rising by six inches) to 6 feet, and 1⅛ inches in diameter, with turned ends.

Navvy Pick.—These handles are made of hickory (sometimes of maple), the lengths being 36-inch, 39-inch and 42-inch. Prices for American hickory are c.i.f. Liverpool 11s. 4d. per dozen for the first size, 12s. 6d. for the second, and 13s. 6d. for the third size.

Hatchet and Axe.—There are two kinds of hatchet handles sold, English ash and American hickory. The sizes of the former range from 12-inch to 24-inch, and the latter from 14-inch to 24-inch.

Fawn foot axe handles are of hickory and run in sizes from 30-inch to 36-inch. The United States is the main source of supply.

Spade, Shovel and Manure Fork Trees.—The designs of these trees vary, being straight or bent stems, and straight or eyed handles. The straight-eye trees are either 30-inch or 32-inch, and the bent are usually of the same length. The bent-foot eye trees are 28-inch long, while the straight or bent crutch trees are 30-inch and 32-inch. Crutch socket trees are from 24-inch to 30-inch long.

Practically all of the above are made of ash, and are produced at home as well as being imported from the United States and Sweden.

It has not been possible to obtain full particulars of current prices in all the above lines, the importers interviewed contending that if Canadian manufacturers have anything to offer they should submit their prices independently of competitors' prices.

Brush and Broom.—Broom handles are now being imported from Canada, so that no comment is necessary beyond stating that some makers insist upon offering unturned ends, which are not saleable in this district.

With regard to brush handles, it would seem that Canadian manufacturers might study British designs more closely. Enormous quantities are sold, and although the costs of domestic production are cut very fine, it should not be concluded that Canada is shut out of the market. They are all made from an acceptable clean white wood, and run in sizes that are quite familiar in Canada.

The usual sizes and types of whitewash brush handles are also in demand, and are made from sycamore or birch.

BRUSH BACKS (STOCK) IN DEMAND

On several occasions in the past attention has been drawn to the enormous quantities of brush backs annually consumed by the brush manufacturers of the United Kingdom. Firms interviewed in Manchester on the subject would be willing to give Canadian woodturners the preference if quality and prices were competitive.

Although very large quantities are turned at home, still larger supplies are imported from Norway, Sweden, and Finland, especially the stocks (backs) for household brooms and strong bass brushes. It is realized that the cheaper labour obtainable in the countries cited constitutes a handicap to Canadian manufacturers. Nevertheless until the latter have gone carefully into their own costs of production and compared their c.i.f. Great Britain prices with those of their competitors they cannot know whether business is possible or not.

Sizes and Current Prices.—The broom stocks required are from 11-inch to 13-inch, rising by $\frac{1}{2}$-inch from the former to the latter size. The 11-inch stocks would have to be delivered to buyer in Manchester, to meet competition, at about 20s. per gross, the price advancing 1s. per $\frac{1}{2}$-inch.

The bass broom stocks run from 11-inch, rising by $\frac{1}{2}$-inch to 18-inch, and would need to be landed at approximately the same prices as the first named.

Banister broom stocks of various sizes are also in demand, the usual sizes running from $\frac{7}{8}$-inch to $1\frac{1}{8}$-inch, and about 15 inches long. Present prices range from 13s. per gross for the smaller size up to 20s. for the larger size.

There are of course scores of kinds and sizes of brush stocks, far too numerous to be quoted here. But should any Canadian manufacturers wish to go thoroughly into the subject the writer would be glad to hear from them.

Samples can be procured for inspection if manufacturers will state the kinds of stocks which their machinery is equipped to turn out. Spruce, alder, and sycamore are the woods in general use.

HOUSEHOLD UTENSILS

Pastry Boards.—Canadian manufacturers have in the past made some attempt to supply pastry boards to Manchester importers, and a little success attended their efforts. For some reason or other, however, no supplies are now coming to hand. Hardware merchants in the district (a list of which can be obtained on application to the Director, Commercial Intelligence Service, Ottawa) are always open to consider offers.

The boards used to be made of a clean white wood 1-inch thick, and the ends should be rounded. Sizes and current prices per dozen are as follows, c.i.f. Liverpool: 12 by 18, 15s.; 14 by 20, 17s.; 15 by 20, 18s.; 16 by 24, 20s. 3d.; 18 by 24, 22s. 3d.

MISCELLANEOUS ARTICLES

To enumerate all the wood utensils in constant demand would entail the compilation of a very lengthy list. If, however, any Canadian manufacturer is interested in such a list, it will be forwarded with the fullest information that can be collected regarding competition, style, and sizes in demand, and also prices if procurable. It seems to the writer that the production of these almost innumerable manufactures of wood is worthy of the closest attention of the wood-turners of Canada. It is all a question of producing the articles wanted at a price that is competitive. Some manufacturers may have studied the matter at close range and decided that they cannot compete; nevertheless, the general opinion of hardware merchants is that Canada should be able to export certain commodities successfully, and they all seem inclined to give the Dominion preference, other things being equal.

COURSE OF PAPER PRICES IN ENGLAND

There is a definite feeling in England that paper prices must advance without delay, says the London *Times Trade Supplement*. Very probably it will have been decided to make an all-round advance in the selling price of printing and E.S. writing papers before these notes appear (April 28). An important meeting will have been held at which the subject will at least have been subjected to full examination. It is common knowledge that much of the paper now being sold is actually made at a loss. The policy of the British papermakers has been to anticipate falling costs in the endeavour to stimulate confidence and promote business. The policy has proved very successful, but lower costs have not matured in accordance with anticipations. There was ground for thinking that the cost of living would progressively decline, in which event a smaller wage bill would automatically have come into operation. Yet wages have not been reduced, and within the last few days a further slight concession in railway goods rates has been offset by the advance in coal prices by about 12s. per ton, consequent upon an increased demand for coal for shipment. Papermaking materials have advanced, and some anxiety is felt in regard to the effect of the Swedish lock-out upon the future trend of wood-pulp prices.

MACARONI CARTONS FOR ENGLAND SHOULD BE OF CONVENIENT SIZE

Acting Trade Commissioner Douglas S. Cole

Bristol, April 26, 1923.—An important point affecting the sales of macaroni is the factor of packing, which Canadian manufacturers have apparently overlooked. At the present time the best-known brand of this Canadian product is sold in elongated cartons approximately 18 inches to 19 inches in length. This type of package is not suitable for the average woman shopping, as it cannot be conveniently carried in a basket, and is unwieldy for storage in the home. A strong competitor of Canadian macaroni is at the present time packing in a 9-inch carton, which has an oval, transparent, gelatine centre, approximately two inches in length, which shows the contents. The package itself is an attractive blue and red and contains the same quantity, i.e., 16 ounces, as the Canadian package. According to one importer, the sales of Canadian macaroni have been very seriously affected owing to the attractiveness of the shorter package, a big selling point of which is the appearance of the macaroni under the transparent centre. One other factor which impresses the housewife is that the contents of this shorter package can be taken out and placed in a jar, or unpacked will stand on end in the cupboard shelf. One of these cartons has been forwarded to the Department of Trade and Commerce, Ottawa, where it may be seen on application to the Director, Commercial Intelligence Service.

Italian and French macaroni is underselling Canadian at the present time, the two former being in the vicinity of 28s. ($6.72 at $4.80 rate of exchange) as compared with Canadian at 35s. ($8.40 at $4.80 exchange) for 28-lb. box lots, there being 28 packages of 16 ounces in each of the cases. The largest importer in this area states that he considers Canadian macaroni is a much better colour than the Italian and is certainly made under far better conditions. At the same time people here have not overcome their old prejudice that Italian must be better than that from any other country. In this regard publicity might be of benefit through advertising media, in which the point could be forcibly brought out that Canadian macaroni is manufactured from the best-quality flour in the world, and certainly not second to Italian. This combined with an attractive package as indicated above, and with the British origin displayed in prominent type, should aid considerably in increasing the trade.

BAMBOO CUTTING RIGHTS FOR PAPER-PULP IN KENYA COLONY

Tenders are invited by the Government of Kenya for two areas of bamboo forest estimated to produce 60,000 tons of pulp per annum; the basis of tender will be a royalty payment per ton of air-dry pulp commencing five years after the issue of the license. No tender of less than 2s. a ton will be accepted. The successful tenderers will be granted licenses under the Forests Ordinance, 1911, for a period of twenty years, with options for renewal for further periods of twenty years on terms to be agreed between the Conservator of Forests and the licensees. Tenders must be forwarded to the Conservator of Forests, Nairobi, Kenya Colony, on or before July 1, 1923, and should be marked on the outside of the envelope, "Tender for Bamboo." Further particulars, including a pamphlet embodying the results of experiments conducted in Kenya, and of measurements taken in the bamboo forests, may be seen at the office of the Crown Agents for the Colonies, 4 Millbank, London, S.W. 1.

TRADE RETURNS AND CONDITIONS IN AUSTRALIA

Mr. D. H. Ross, Canadian Trade Commissioner in Melbourne, sends under date May 5, 1923, the following cablegram giving trade totals for Australia for year ended June 30, 1922, and describing general business conditions:—

"The Australian trade returns for the year ended June 30 last just published disclose total reduction in imports as compared with previous year by £60,735,390; imports from Canada were reduced by £1,278,812 or approximately 28 per cent; imports from United States were reduced by £17,290,364 or approximately 50 per cent. For the nine months ended March 31, 1923, imports aggregated £99,497,140, showing an increase of £28,274,013, while exports were valued at £94,802,395, an increase of £34,677 as compared with corresponding period in 1921-22. Of all states South Australia alone is offering wheat for export, others holding for higher values on account of continuation of dry weather conditions; wheat nominally 5s. 6d. per bushel; flour £10 17s. 6d. per ton in 150-pound sacks free aboard Adelaide. Wool sales completed for season; total returns estimated at 38 to 40 millions sterling, with outlook for considerably reduced clip this season. General rains in Queensland have saved hundreds of thousands of cattle; coastal rains in New South Wales are helpful, but otherwise continued absence of rain throughout Australia is seriously affecting commercial prospects, hence trade while sound is without animation."

COMMERCIAL NOTES FROM NEW SOUTH WALES

Commercial Agent B. Millin

Mineral Production in New South Wales

Sydney, March 29, 1923.—The mineral production in New South Wales for the year 1922 has been officially valued at £14,274,770, an increase of £266,122 as compared with the previous year, mainly due to renewed activity on the Broken Hill silver-lead field. This amount has only been exceeded in 1918, when minerals to the value of £14,419,352 were produced. This record would have been eclipsed had the Broken Hill Proprietary Company's steel works at Newcastle remained in operation during the whole of 1922. The cessation of smelting at these works contributed to a great extent towards the much reduced production of coal and coke and the various fluxing metals, but as the works have again been opened, this year's totals will be very materially affected.

The quantity of coal wrought during the year amounted to 10,183,133 tons, a decrease of 610,254 tons as compared with 1921. The value at the pit mouth for the 1922 output is £8,507,946, a decrease of £570,442 on that of the previous year. The aggregrate production of coal in the state to the end of 1922 amounted to 277,657,000 tons, valued at £123,453,955.

The aggregate value of all minerals won in the state to the end of 1922 is £350,113,801. During the year 30,904 persons were employed in and about the mines of the state, an increase of 1,203 in comparison with the previous year.

Cotton Growing in Australia

Although the season has been very unfavourable owing to drought conditions in many parts, cotton growing continues to attract great attention. It is stated that the number of cotton growers in Australia has increased from 2,000 to 15,000, and it is estimated that in the State of Queensland alone there will be more than 20,000 growers next season, and the area planted will be increased

from 70,000 to 150,000 acres. Less than 1,000,000 pounds of seed cotton were grown here in 1921, but this year it is expected that Australia's cotton yield will reach 25,000,000 pounds.

[Recent reports on cotton-growing in Australia to which attention may be directed have appeared in *Commercial Intelligence Journal* No. 973 (September 23, 1922) and No. 995 (February 24, 1923).]

Record Wool Prices at Sydney

The following statement shows the record prices obtained in the Sydney market so far this season, together with those of last season, and, for purposes of comparison, the records obtained immediately preceding the war. The prices given are in pence at per pound.

		Season.	
	1922–23	1921–22	1913–14
Greasy Wool—			
Fleece, merino	38½	34½	16
Necks, merino	30¼	24¼	13½
Broken, merino	31½	23¾	13
Pieces, merino	29½	25	13
Lambs, merino	27	22	14¾
Bellies, merino	26¼	19¼	11¼
Black, merino	15½	13½	11
Locks, merino	14¾	10¾	8
Dead, merino	23¾	19¾	10½
Fleece, crossbred	34¾	23½	14¾
Lambs, crossbred	20	14¼	13¼
Fleece, comebacks	35	25¼	16
Scoured Wool—			
Fleece, merino	..	..	..
Clothing	43	43	26¾
Combing	45	44¼	26¾
Pieces, merino	37¼	36¾	23¾

BRITISH COLUMBIAN APPLE SHIPMENT TO BRITISH MALAYA

TRADE COMMISSIONER A. B. MUDDIMAN

Singapore, March 24, 1923.—A small shipment of British Columbia apples arrived in Singapore last season. Through the kindness of the importer, this office is able to furnish a few observations on the condition of the apples.

The apples were shipped somewhat late in the season and were consequently matured. Canadian apples for this market should be shipped early in the season. Even green fruit though immatured might not be objected to. The importer, who has brought in Australian apples and has considerable knowledge of that trade, states that "the packing of the British Columbia boxes was the best I have seen and far superior to any packing in Australian apples." It has been stated that B.C. apples were packed too tightly for this market, and that a layer less in the box replaced by paper would be an improvement. In the opinion of the importer this is not the case, and so far as he had observed as a result of this initial shipment, no improvement could be made in the packing.

A large apple is not wanted; the size preferred is from 2¼-inch to 2½-inch, and for this reason: The retail price of a 2½-inch apple is around 10 cents. For a slightly larger size, the retail price would not be 11 or 12 cents but 15 cents. As the average retail price of apples ranges between 7, 10 and 15 cents, this spread between the value of a 2½-inch apple and of one slightly larger is not in proportion to the spread between their prices. Consequently consumers prefer to purchase an apple round about the 2½-inch size for a price of 10 cents.

In the shipment in question five kinds of apples were included. Golden Russets arrived in fair condition, but had evidently been packed too ripe. These

should be packed as early as possible for consignment to the Middle East. Northern Spies are not suitable travellers. Spitzenbergs stood the journey best, the proportion of good apples in the case being very much higher than in any of the other varieties. It is possible that shipments of apples to this market should be limited to Spitzenberg and Golden Russets. Grimes Golden are absolutely useless. In this particular case, there was hardly a sound apple amongst them. Winter Bananas were not an entire success, probably due to the fact that they were packed too ripe.

Shipments of apples to this area are necessarily small. The right way to dispose of them at this end is for the importing house to sell directly and thus have them on the retail market as soon as possible. As the Canadian apple season is complementary to the Australian, it is not impossible that exporters will gradually build up in this area a small trade in British Columbia apples. The middleman, who is a native, is quick to appreciate when the market has reached its saturation point. Consignments of apples above that point have to be sold at any price so that they shall not rot on the hands of the importer. Therefore shipments as small as possible at regular and frequent dates are desirable.

Australia, with direct communication and comparatively near in point of distance, is in a very advantageous position for exporting apples to British Malaya.

As the shipment under discussion was perhaps the first of Canadian apples to this territory, a word of praise is due both to the exporter and to the importer. It must be remembered that this shipment on arriving at Hong Kong had to be transhipped owing to the lack of regular communication between Vancouver and Singapore. If at a later date, direct cold storage marine communication is established between Vancouver and Singapore, the prospects of the sale of British Columbia apples in this area would be considerably enlarged, but it will never reach large proportions. The writer considers, however, that it is a bold undertaking, and takes the opportunity to point out the great initiative needed on the part of the Canadian shipper. It is a daring policy to ship fresh fruit to a centre thousands of miles away perched on the equator.

EXPORTERS FAIL TO FURNISH CERTIFICATES OF ORIGIN TO THE BRITISH WEST INDIES

TRADE COMMISSIONER G. R. STEVENS

Kingston, Jamaica, April 28, 1923.—It is again necessary to draw the attention of Canadian exporters to the matter of providing certificates of origin with shipments to the British West Indies. Failure to provide such certificates is not only exasperating to the West Indian merchant, but in many cases it obliterates any chance of a repeat order.

The West Indian merchant is given a c.i.f. quotation. Upon adding landing costs and duty, he finds that the Canadian quotation shades competition. The goods arrive without certificates of origin, and the merchant finds that he must pay from 25 to 50 per cent more duty than he expected, unless he can unofficially persuade the Customs authorities of the origin of the goods. In many cases this is not possible, and the final cost of the goods becomes considerably higher than that of competitors, through carelessness and negligence on the part of the Canadian exporter.

Any firms exporting to the West Indies who are not certain of the invoice requirements for these islands should at once apply to the Foreign Tariffs Division, Department of Trade and Commerce, Ottawa, who will be pleased to forward full information upon documents covering such shipments.

POSSIBILITIES IN IRRIGATION WORKS MACHINERY FOR SIAM

Trade Commissioner P. W. Ward

Ottawa, May 8, 1923.—Following a trip to Siam last year and the representations then made to the Ministry of Lands and Agriculture as to Canada's ability to cater for certain requirements in machinery for irrigation works, the writer recently received advice from the Director General, Royal Irrigation Department, Bangkok, that opportunity will be given Canadian manufacturers to quote on all irrigation requirements as and when tenders are called or special purchases considered.

In this connection it is desirable that certain preliminary information as to the class of irrigation equipment and machinery in use should be recorded. In passing, it may be mentioned that in 1914 a scheme of irrigation for the Menam Valley in Central Siam was inaugurated and authority accorded by H.M. the King of Siam for an expenditure not to exceed three million pounds sterling. During the ensuing period surveys were made and a portion of the work undertaken. To-day the operations of the Royal Irrigation Department cover an extensive field and development is proceeding along steadily increasing lines.

The heavy machinery required from time to time comprises the following—excavators, dredgers, pumps, portable engines, ditching machines, workshop machinery, light railway equipment and rails.

A number of types of steam excavators have been used during the last few years in connection with Siam's irrigation work, one of the first and most satisfactory being the Lubecker. This it is understood is a very moderately priced machine. In a report some time since by Mr. R. C. R. Wilson, C.E., Director of the Department, a Ruston No. 8 steam crane navvy was recommended for its good record. Excavators are required for two classes of work, one for the small channels where all the earth is to go to one bank and the other for a width of 24 metres and a depth of more than 3 metres where the earth is to go to both banks.

The dredgers primarily in use in Siamese irrigation work were of the ladder and bucket pattern. These were not, however, suitable for some of the work as a great part of the superstructure had to be dissembled before they could pass under bridges. The type of dredger generally required is the suction dredger of large pumping capacity. For certain of the works these should be non-propelling, and Diesel engines were some time ago called for in the specification. Dipper dredges of 2½ cubic yards capacity were also called for, for use in stiff clay which the ladder and bucket and suction dredges could not tackle as readily, and which can place the material taken out over on the bank or into dredges. It was stated by the Director some time ago that this type of dredger was not as effective in pumping out the silt over the country as the ladder and bucket dredgers and suction dredgers. The soil in Siam is similar to that in Bengal and Lower Burmah, where suction dredges have for some time been adopted as the best means of removing the soil. In Siamese works the soil must be pumped to a distance as, generally speaking, there are no banks and houses are frequently found in fair numbers where the banks should be. It is understood that Simons dredgers have been an economic investment in the Punjab irrigation works in India, but the writer is not aware as to this type being in use in Siam. A little while ago the Siamese Director stated that a hydraulic dredger having a total length of 28 metres, 5 metres broad, 2·5 metres deep and with a draft of 0·75 metres, worked by Diesel engines and pumps of the largest capacity which could be fitted into that size of hull would give excellent results for the class of work anticipated. It should be non-propelling and able to dredge its own flotation. It should be capable of lifting 15 feet and discharge the silt direct on to the banks without delivery through pipes. Further, it should be fitted with a helical cutter for dredging through clay.

Ditching machines are required for the smaller channels. It is possible that at least one type of machine made in Canada might be acceptable for this work.

The soil in Siam is very watertight, and it is stated that a large pumping plant is not desirable. Quite a number of portable centrifugal pumping plants, with engine and pump combined, are required from time to time, the centrifugal pumps to be 6 inches.

Vertical boilers for the smaller class of work are required in fair number.

PACKING OF CANNED GOODS FOR INDIAN MARKETS

TRADE COMMISSIONER H. A. CHISHOLM

Bombay, April 6, 1923.—A very instructive example of how not to pack canned goods for the East has recently come to the attention of the writer at this side of India. The consignment in question was shipped to India via Hong Kong a few weeks ago by one of the largest and most experienced packers of canned goods in North America. The goods are now lying in the warehouse of the consignee who is attempting to sort out the damaged tins from the hundreds of badly broken cases. Such a large percentage of the tins are damaged that this entire shipment of many hundreds of cases of canned fruits and vegetables will probably fetch on the Indian market no more than 50 per cent of the c.i.f. price of the goods.

WIRE VERSUS HOOP-IRON STRAPPING

Two methods of packing were employed in this shipment. Most of the cases were fabricated from light $\frac{1}{4}$-inch wooden shooks, reinforced at the ends by one-inch strips, and " wirebound " with five strands of light gauge wire. A smaller portion of the shipment came in cases fabricated from $\frac{1}{2}$-inch wooden shooks for sides, top and bottom, and $\frac{3}{4}$-inch shooks for the two ends, each end being bound with hoop-iron strapping. Each case contained an average of two dozen cans of fruit, vegetables, or canned salmon (four dozen), and the average gross weight of each case was a little over fifty pounds. When the order for shipment was despatched to the shippers in North America, the customer at this end specified that the strongest and most rugged cases available should be used for packing, and that on no account should " frail " cases be employed.

When the complete consignment was examined in the consignee's warehouse in India, it was found that with very few exceptions the wirebound cases were badly broken, and that at least 80 per cent of the cans in these cases were severely dented. The shooks were so light that the wire bands broke through them, often dividing the shooks into three or four sections which broke away from the case, leaving it open for pilferage. The consignee does not expect to realize more than 40 per cent of the landed cost on the contents of the wirebound cases.

On the other hand, practically all the hoop-iron bound cases in which sturdier shooks were employed arrived in undamaged condition. The $\frac{1}{2}$- and $\frac{3}{4}$-inch shooks withstood the rough handling without cracking or buckling, while the hoop-iron held the ends of the cases firmly. Most of the tins and labels were found to be in good condition, and these cases have been sold at a profitable figure.

ROUGH HANDLING BY COOLIES

When the consignee informed the shippers by wire what had happened to this consignment, a letter came back pointing out that they had recently been sending their goods to many parts of the world in wire-bound cases of this type and that they had found them very satisfactory. Moreover, it was pointed out

that some pains had been taken to ensure that every case was marked "FRAIL" or "HANDLE WITH CARE," and that it was most difficult to understand how these cases had been so badly broken. Of course the consignee could not miss the opportunity of pointing out the lamentable lack of literary attainments on the part of the coolies who handle freight or ship's cargo in India, and of asking why "frail" cases had been used when he had particularly requested the strongest cases available.

It is very important for shippers to the East to realize that nearly all parcel merchandise in India is shifted on the heads of coolies, who are of course illiterate and may be given to spiriting away anything that is not securely bound or too cumbersome to carry off. What generally happens to any light boxed merchandise at any Indian port or transfer point is as follows: One coolie lifts a case on to the head of another, who carries it to its destination and simply topples it off his head on to a cement platform or on to other cases. It may also happen that the coolie drops his case somewhat more heavily than necessary to ensure its breaking in order that he may have an opportunity of taking some of the contents. When a consignment of attractive and expensive canned fruit receives this sort of treatment two or three times—in transhipment at Hong Kong, and at the Indian port of entry—the shipper of "frail" cases is simply tempting providence. *Canned goods must be shipped to India and the Middle East in strong and rugged cases* which will successfully withstand a succession of descents from coolies' heads on to cement floors.

THE USE OF SAWDUST AND STRONG TISSUE PAPER RECOMMENDED

Even when cases are smashed by severe handling, the damaging of the cans could be reduced to a minimum by wrapping each can in strong tissue paper and packing each case with sawdust. Sawdust helps to prevent the cans from knocking against one another and thus avoids bad denting. If one can in a case is so badly dented that the liquor leaks out, the sawdust will absorb the liquid and prevent it from ruining the labels of the other cans in the case. Then tissue paper helps to prevent dampened sawdust from discolouring labels. The Indian bazaar merchant carefully examines every can of every case of canned goods he buys and he tries to wring a discount out of the importer for every dent or bit of discolouration he discovers. Therefore the shipper must use every means in his power to assist his consignee in maintaining his legitimate profit by packing his goods so carefully that the risk of damage in shipment is reduced to a minimum. Success and permanence in Eastern trade depends so much on proper representation that the exporter who has a good agent on the spot must do everything possible toward making him keen on retaining his connection. The good agent can pick and choose his firms for representation, and he does not take long in giving up any exporter who does not support him down to the smallest detail.

AGRICULTURAL IMPLEMENTS TO BE TESTED IN LATVIA

Agricultural implements of decidedly inferior quality have appeared on the Latvia market in large numbers, and, in consequence, the Agricultural Department has begun to draft special regulations affecting trade in this line. According to these regulations all agricultural machinery and implements imported will have to be submitted to the Agricultural Department for preliminary test. If the tests show unfavourable results, the sale of the implements in Latvia will be prohibited.

TRADING POSSIBILITIES IN HOLLAND FOR CANADIAN PRODUCTS

TRADE COMMISSIONER NORMAN D. JOHNSTON

Market for Tinned and Powdered Milk

[*This is the eighth of a series of reports by Mr. Johnston on Trading Possibilities in Holland for Canadian Products. The first, on Grain and Feeding Stuffs, was published in No. 982; the second, on Flour, in No. 984; the third, on Dried and Evaporated Apples, in No. 991; the fourth, on Canned and Preserved Fruits and Vegetables, in No. 992; the fifth, on Canned Fish, in No. 993; the sixth, on the Demand for Sugar, in No. 998; and the seventh, on Syrup and Honey, in No. 1,000.*]

CONDENSED AND EVAPORATED MILK

Rotterdam, April 23, 1923.—Holland is a large manufacturer of condensed milk, and in 1921 exported almost 23 million kilogrammes (about 50 million Canadian pounds) of sweetened full cream milk, about 51 million kg. (112 million pounds) of sweetened skimmed milk, 1·8 million kg. (about 4 million pounds) of unsweetened full cream milk, and 44·6 thousand kg. (98 thousand pounds) of unsweetened skimmed milk. Great Britain has been the largest market for Dutch tinned milk, but France, Austria, British India, and the Netherlands East Indies have also been large buyers from Holland, while exports as well are made to many other parts of the world.

Condensed and evaporated milk, however, is imported into Holland not only for consumption in the Netherlands but also for export to other countries. The figures of statistics do not therefore give a correct view of the trade, as a Dutch firm might be selling American milk for instance to Czecho-Slovakia, or other of the Middle European states, and have delivery made via Hamburg which would not be shown in the Dutch statistics. The official figures, however, indicate that in 1920 Holland imported 25,253 kg. (55,557 pounds) of sweetened full cream milk, in 1921 about 5,000 kg. (11,000 pounds), and in 1922 approximately 11,000 kg. (24,000 pounds). The largest amount was supplied by Germany in 1920, and the United States was the biggest contributor in 1921 of sweetened full cream milk.

The imports of sweetened skimmed milk in 1921 were, however greater, being 68,048 kg. (149,706 pounds), all of which came Great Britain. In 1922 no sweetened or unsweetened skimmed milk was imported from abroad.

The quantity of unsweetened full cream milk entering Holland from outside sources has increased rapidly, having risen from 344 kg. (757 pounds) in 1919 to 8,153 kg. (18,729 pounds) in 1920, 54,654 kg. (120,239 pounds) in 1921, and about 231,000 kg. (508,200 pounds) in 1922. The United States supplied most of the full cream milk with sugar in 1920, while Great Britain, Norway and France were the main contributors in 1921.

The market for condensed or evaporated milk depends to a considerable extent on the price of sugar, the sweetened sometimes being in demand and sometimes the unsweetened. The principal line manufactured in Holland is sugared condensed milk, the production of sweetened skimmed milk being the greatest. Tins of 16 oz., 48 tins to a case, are mostly required. In general it may be said that the trade in imported condensed or evoporated milk is not large, but as the previous figures will indicate it is well worthy of consideration and is one that may be developed, not only for domestic consumption but for export to other European countries.

MILK POWDER

Milk powder is quite an important article in Holland, and it is imported as well as manufactured in the Netherlands. In 1921 the imports of milk

powder of full cream milk amounted to 407,211 kg. (895,864 pounds), which came in largest quantities from Great Britain (547,626 pounds) and the United States (248,444 pounds). Germany and Belgium were also suppliers with 67,346 pounds and 25,128 pounds respectively. Germany was, however, the largest market for Dutch exports of milk powder from full cream milk, and in 1921 received 2,965,390 kg. (6,523,858 pounds) out of a total exportation from Holland of 4,409,730 kg. (9,701,406 pounds). The other countries which served as a market for Dutch exports in order of importance were Belgium, Great Britain, France, Switzerland, Austria, Norway, Czecho-Slovakia, Sweden and South Africa. In 1922 the imports amounted to about 312,000 kg. (686,400 pounds).

Quite a good business is done in milk powder of skimmed milk, of which 277,086 kg. (609,589 pounds) were imported into Holland in 1921, the United States supplying 172.900 kg. (380,380 pounds), Austria 56,740 kg. (124,828 pounds), Great Britain 27,644 kg. (60,817 pounds) and Germany 19,573 kg. (43,061 pounds). In 1922, Holland imported about 185,000 kg. (407,000 pounds) of powdered milk made from skimmed milk, while she exported 1,363,988 kg. (3,000,774 pounds) in 1921 and about 1,683,000 kg. (3,702,600 pounds) in 1922. principally to Germany, France, Austria, Belgium, Switzerland and Great Britain.

There is a good demand at present for milk and cream powder (especially for the so-called spray system) in Holland particularly for export, but whether Canadian exporters can compete with Dutch or other powder will depend on price. The size of the container does not appear to be of great importance as long as the milk powder is carefully and securely packed. Cases of 50 kg. net seem to be in favour, while inquiries have also been received for milk powder in barrels of 200 pounds.

REPRESENTATION NECESSARY

As there is so much competition in these lines, it will be necessary to be represented on the spot by a good live firm well known in the trade. The agents should be furnished with a sufficient quantity to enable the quality to be demonstrated among the leading buyers, after which price is the main consideration. The representatives are able to keep in touch with the market and sell where the best prices can be obtained, whether in Holland or some other country in Europe, much better than the Canadian exporter can do who tries to transact the business direct with the importers without the aid of an agent. The representative can also keep the Canadian exporter informed constantly of the condition of the market, prices and sources of competition.

CONSIGNMENTS

In order to meet competition from Dutch and other producers who have stocks on the spot and can supply at short notice, it may be necessary to send goods on consignment to the agent, but before doing so care should be taken that the right agent has been appointed and the quanity sent should not be any larger than is absolutely necessary. More frequent smaller shipments are better than fewer larger consignments as the money is not then tied up so long. After the goods have become known, the main endeavour should be for direct shipments to the importers, the orders being sent to the exporter by the agent. Even in the latter case a small stock on the spot may be found useful in order to fill the smaller orders.

QUOTATIONS AND TERMS

Quotations should be sent c.i.f. Dutch ports so that the landed charges may be known and compared with those from other sources. Otherwise it will be difficult to obtain the interest of the importers.

The terms are generally cash against shipping documents Holland, but some firms give longer terms. It is useless, however, for Canadian exporters to endeavour to do business on letters of credit or cash against documents in Canada, as importers will not even consider such conditions; and why should they when they can get much more desirable terms from other suppliers whose products they know? If the agent is acquainted with the firms in the trade, there is very little risk in doing business on a cash against documents Holland basis. It is purely a matter of calculation.

If Canadian firms interested in exporting condensed or evaporated milk or milk powder will communicate with the Canadian Trade Commissioner in Rotterdam, forwarding at the same time all necessary details regarding their products and their export policy, they will be given all possible help to get into touch with suitable representatives and every assistance will be afforded them to get started in the Netherlands market.

ECONOMIC CONDITIONS IN HOLLAND

Trade Commissioner Norman D. Johnston

Rotterdam, April 20, 1923.—Grave consequences in Holland are following the occupation of the Ruhr, as the Rhine forms a valuable element in Dutch economic activity and national prosperity. The most serious injury has been sustained by shipping and navigation. Trade generally and coal deliveries especially are being seriously affected, and the continuation of the Ruhr occupation, which has cut Holland off from an essential source of supply, is bringing about a rise in prices.

The export of goods of every description from the occupied territory of Germany is prohibited unless an export license has been obtained and 10 per cent ad valorem is paid on the goods. This export permit must be obtained by the German exporter, but the German Government has prohibited German nationals from applying for such export permits, which makes trade difficult for Dutch importers of German goods. A further consequence of this export tax and of a tax levied on the import of various articles has been that transit trade is being diverted from Rotterdam to Hamburg and Bremen. Holland is to a large extent dependent on the products of the Ruhr, especially coal and iron and steel products, and it can therefore be realized the consequences for Holland of the occupation of that region.

Coal has advanced in price about 40 per cent, and sugar, coffee, tea, and rubber prices have also risen, while the cost of living, which rose slightly during the latter months of 1922, has continued its upward movement.

There is, however, another side to the question. The falling off in German imports offers to other foreign producers the prospect of extending their market in Holland. The rise in the price of coal is likely to increase the cost of production in Holland with a resultant higher price for the finished article, which should also help Canadian firms to improve their position in the Dutch market.

The higher prices have given rise to anticipations of higher profits or a revival of trade, while the lessening of German competition in certain lines, as well as the fact that the balance sheets just published of various industrial concerns are not at all unsatisfactory, has led to a rather brisk activity on the stock exchange, so that the exchange index figures show an increase of 1·12 per cent and 1·08 per cent for stocks bearing fixed interest and bank shares respectively and a decrease of 2·89 per cent for miscellaneous shares during March.

The trade returns for January and February show an increase in imports of about $30\frac{1}{3}$ million guilders and in exports of approximately $15\frac{2}{3}$ million guilders

as compared with the corresponding months of last year. The ordinary receipts of state revenues were also higher by about 10 million guilders during January and February than in the same period of 1922.

The number of persons liable to property tax in Holland has increased roughly 70 per cent since 1914-15. A drop in the groups which comprise the largest fortunes was recorded last year, and an increase in the number of small fortunes.

CONDITIONS IN MEXICO

TRADE COMMISSIONER C. NOEL WILDE

Mexico City, D.F., March 31, 1923.—Although the general conditions of Mexico cannot be considered as completely satisfactory from a commercial point of view, there are many indications that the depression from which the country has been suffering for the past year has now passed its maximum, and it may be legitimately hoped that the year 1923 will see an improvement in all branches of business. The position at present may be described as a period of waiting; favourable indications for the future are seen in the improvement in the mining situation and the generally peaceful condition of the country, while against this must be set the scarcity of new capital for industrial enterprises, the possible effect of the introduction of paper currency, and the reduced purchasing power of the people, from which the Mexican public suffers in common with that of other countries.

LABOUR

Labour difficulties and strikes are causing anxiety in several of the states, notably in Veracruz and Yucatán, where the Communist element is exceptionally strong. In Veracruz these difficulties have centred round the stevedores of the port, where a strike tied up traffic for a period of several weeks, vessels having to be diverted to Tampico for unloading.

In the Federal District, in addition to labour difficulties in the paper mills of the San Rafael company, a strike has taken place among the workers of the street railway company; this latter caused serious discomfort to the population of the capital, but was permitted to run its course by the Government; attempted rioting was, however, suppressed with a firm hand. In Yucatán the situation gives cause for anxiety, labour being scarce on the henequen plantation; this is the consequence of a natural reaction, men having formerly been forced to work for long hours at low wages; compulsion being now impossible, much less labour is obtainable, and many of the plantations are going out of cultivation. The total henequen crop is handled for trading purposes by the State Government, but an increasing shortage is anticipated in the future, with consequent high prices.

BANKING

The Government is considering the formation of a "sole bank of issue," or "Banco Unico," for the purpose of issuing paper currency. At present, no bank notes whatever circulate in Mexico, a metallic currency of gold, silver and bronze, with small amounts of nickel, forming the sole medium of exchange. While this method has its advantages in the way of maintaining the Mexican peso at or near par, many inconveniences are felt when it is necessary to carry large sums of money on the person, or transfer currency from one point to another, and it is felt that the reintroduction of paper money will facilitate trade within the country. Negotiations for the loan necessary to carry the scheme into effect have not yet been completed, but the present intention is to

obtain the support of French financial interests, who in turn will secure the necessary funds from New York. Opinions as to the desirability of issuing paper money in Mexico are divided, those opposed to the scheme claiming that the experiences of the past few years will cause the public to look with suspicion upon such currency, however well secured. On the other hand, it is claimed that the additional convenience will soon make itself felt, and once confidence in its value is established, paper will readily be accepted at par.

Financial and commercial interests are watching the development of the scheme with interest, realizing that the reintroduction of paper money will have a great influence upon the course of commerce, irrespective of the nature of that influence.

COMMERCIAL

While it cannot be said that a commercial crisis exists at present, general reports are to the effect that business is in a depressed condition, and buying is principally for immediate requirements only. The cause of this condition of affairs is to be found principally in the general financial stringency which rules throughout the world, but a contributing cause may be found in the fact that the slump of 1921, which was the cause of so much distress to manufacturing nations in general, did not reach Mexico until some months after it was felt in other countries; similarly, the recovery of trade which has recently been seen in other countries has been delayed in Mexico, although the economic situation in general shows slight signs of improvement. Commercial houses are, however, disposed to sell for cash only, and collections on the average are reported to be difficult; money for investment is scarce throughout the Republic.

MANUFACTURING

The manufacture of cotton piece goods, which forms one of the most important industries in the Republic, is decreasing, owing to the lack of raw material; this situation has been aggravated lately, and it is reported that a number of factories have found it necessary to close down. At the same time, stocks on hand in the factories are stated to be sufficient to meet the present demand, and for this reason the proprietors are not suffering to the same extent as the workmen, who find themselves thrown out of employment.

There is a seasonal lack of demand for woollen goods, and such factories as are working are doing so in anticipation of the requirements of the next winter season.

Conditions are reported to be somewhat irregular in the boot and shoe industry, which is rapidly taking a leading place in the manufacturing life of Mexico. While some factories are reported to be quiet, others are stated to be working full time, and unable to fill all the orders entrusted to them.

Other industries are reported to be quiet, with no notable changes in either direction.

NATIONAL DEBT

Plans are now being completed by the Mexican Government for the resumption of payment of interest on the National Debt, which has remained in default since 1914. The details of the arrangements by means of which these payments are to be made are contained in the de la Huerta-Lamont agreement, and a special committee arrived in New York at the end of February last to confer with the Bankers' Committee on the subject. It was intended that the first payments should be made early in April, but this date has been deferred owing to minor difficulties having arisen in connection with the deposit of bonds and coupons; at the same time, reports indicate that the whole matter will be settled

to the satisfaction of all parties at an early date. In view of the importance attached to the settlement of this question by financial interests, a list is given below of the principal securities comprised in the agreement referred to:—

	Amount Canadian Currency.
United States of Mexico 5 per cent Consolidated External Gold Loan of 1899..	$ 48,635,000
Republic of Mexico 4 per cent External Gold Loan, 1910..	50,949,000
United States of Mexico 6 per cent ten-year Treasury notes, 1913 (£6,000,000)..	29,100,000
United States of Mexico 6 per cent ten-year Treasury notes, 1913 (£6,000,000)..	29,100,000
City of Mexico 5 per cent External Loan of 1889..	6,769,000
Institution for Encouragement of Irrigation Works and Development of Agriculture, 4½ per cent sinking fund gold bonds..	25,000,000
United States of Mexico 4 per cent Gold Bonds of 1904..	37,037,000
Republic of Mexico Consolidated 3 per cent internal debt of 1886..	21,151,000
United States of Mexico 5 per cent Internal Redeemable Bonds of 1894..	46,455,000
Total..	$265,096,000
Funded debt of National Railways..	242,361,000
Accumulated interest..	203,588,000
Total, Canadian Currency..	$711,045,000

The above omits certain guaranteed bonds of the states of Veracruz, Tamaulipas and Sinaloa, which amount to about two million dollars. It also omits the securities issued by former President Huerta, which are not at present recognized as a liability by the Government.

MINING

A notable increase has taken place in mineral production during the early months of 1923, as compared with the corresponding period of 1922. This refers particularly to the production of silver and gold, comparative figures for the two months ending February 28 being as follows:—

	Jan.-Feb. 1922	Jan.-Feb. 1923
Gold, kg..	3,691	4,167
Silver, kg...	378,406	446,743

With regard to other minerals, figures are available only to the end of January; but during this month the production of lead doubled, that of copper increased fivefold, and the production of zinc showed an increase of seven times as compared with the corresponding period of the previous year. The following are details:—

	January 1922	January 1923
Lead, kg..	6,638,446	13,120,235
Copper, kg..	540,255	2,690,156
Zinc, kg..	70,843	534,337

Increased interest appears to be manifested by foreign capital, more especially from the United States, in the development of mining properties in Mexico and in the reopening of mines which have been closed down during the past few years. Companies already operating are also reported to be securing options on new prospects. These remarks refer principally to silver- and gold-bearing properties, but they are also true to a less extent of copper. While this activity does not approach the dimensions of a boom, and its influence should not be exaggerated, it has created a feeling of optimism in mining circles and an anticipation of increased prosperity. The chief cause for anxiety is found in the operation of the Pitman Act in the United States, which has held the price of silver at high levels, thereby making it possible to work low-grade silver-bearing properties at a profit; if the operation of this act ceases within the next few months (as is anticipated), the probabilities are that the price of silver will decrease, and a number of mines may be compelled to close down.

PETROLEUM

A report recently issued by the Department of Commerce and Labour states that at the beginning of 1923 conditions were favourable in Mexico for the petroleum industry, on account of the tendency towards increased prices in all mineral oil products, and the prospects of reduced stocks in the United States.

A report has been circulated recently to the effect that Venezuela was rapidly taking the place of Mexico as an oil-producing country. An analysis of the actual figures, however, does not bear out this contention, the production for the year 1922 being as follows:—

United States	551,197,000	barrels.
Mexico	182,278,000	"
Venezuela	2,335,000	"
All other countries	112,951,000	"
	848,760,000	"

It will be seen that of the total production the United States was responsible for 65 per cent, Mexico 21·5 per cent, and all other countries the remaining 13·5 per cent. Thus Mexico continues to occupy second place in world production. During the month of January, 37 wells were completed, of which 19 were productive, with a total initial daily production of 106,819 barrels.

The total production of oil for the month of January amounted to over 12,000,000 barrels, slightly less than that of December. The chief centre of activity was in the Pánuco field, which was responsible for over 40 per cent of this total, the second place being occupied by the Toteco and Cerro Azul fields, which provided a further 22 per cent of the total.

The total exports of crude petroleum and its derivatives during January were 11,350,000 barrels, or slightly less than for the month of December. The greater portion of this was exported from the port of Tampico, followed by Tuxpam and Puerto Mexico.

RAILWAY CONSTRUCTION

The Southern Pacific Railways of Mexico are making arrangements for the completion of the line from the Mexican border at Nogales to Guadalajara. This line is at present in operation from Nogales to Tepic in the State of Nayarit (a distance of 931 miles), but the completion of the work between Tepic and Guadalajara, which involves the construction of some 53 miles of line through difficult and mountainous country, has been delayed owing to financial conditions.

It is understood that the necessary capital has now been raised for this purpose, and construction will start at an early date. When completed, the railway will provide a direct service from the southwestern United States to Guadalajara, and thence to Mexico City, opening up valuable mining and agricultural areas, and giving rail communication from the Western Mexican ports of Guaymas and Mazatlán to points in the interior.

FOREIGN TRADE

Statistics of foreign trade for the month of January, 1923, have recently been issued by the Department of Finance. These indicate that the exports (excluding petroleum, the figures of which have not yet been completed) reached a total of $10,304,700, as follows:—

Animal substances	$ 276,263
Vegetables	4,065,987
Mineral	5,787,740
Manufactures and Sundry	174,710
	$10,304,700

Of the above, 95 per cent went to the United States, the balance being divided between France, Germany, Spain, with other countries taking negligible quantities. Canada is shown as taking $10,000 worth of goods, and it is anticipated that this figure will increase in the future.

With regard to imports, these represent a total value of $11,648,950, divided as follows:—

From the United States	$ 6,942,430
Germany	2,672,582
Great Britain	687,075
France	397,166
Spain	334,806
Canada	82,044
Other countries	532,847
	$11,648,950

The most noticeable feature in the import statistics is the position occupied by Germany, and the decrease which has recently taken place in the import of foodstuffs to Mexico. In reference to the latter, a report recently issued by the Department of Finance states that during 1921 Mexico expended more than $5,000,000 on the importation of maize alone, whereas in the past year this figure was reduced to slightly over $1,000,000. Imports of maize, wheat and flour, however, still continue, in spite of the duties which have been levied in order to protect the local producers. Apart from these items, the largest imports of foodstuffs consist of lard and lard substitutes ($3,067,000), flour ($923,000), and eggs ($1,019,000); imports of such foodstuffs as hams, butter, cheese, milk, raisins, rice and prunes account for a sum of $840,000, and other items being comparatively small.

EXCHANGE

No fluctuations of any importance have taken place during the past three months in the rate of exchange on New York and Montreal. As a general rule, the Mexican "peso" remains approximately at par, on account of the currency of the country being purely metallic, no bank notes or bills whatever being in circulation. At the moment of writing, exchange on New York is at the rate of 48⅝ cents, and on Montreal 50 cents, mint par being 49·85 cents to the peso.

CUSTOMS CHANGES IN SOUTH AFRICA

Assistant Trade Commissioner J. Cormack

Cape Town, April 5, 1923.—The Minister of Finance in his budget speech last week submitted to the House of Assembly the proposed new Customs and Excise Duties to be dealt with during the present session and which are now in operation. These are appended for the information of Canadian exporters. The increases in customs duties are in accordance with Government policy and pledges, and are chiefly for protective rather than revenue purposes. With regard to the deferred additional duty on glass bottles and jars, it is learned unofficially that these will come into operation at such time as local manufacturers are in a position to take care of the full needs of the country in these lines.

With regard to paper, although the local producers import the pulp they use from Scandinavia, their protection has been increased. The new rebate gives some slight increase in the British preference.

Part I.—Customs Duties.

Article	Present Duty	Rebate	Proposed Duty	Rebate	Increase
	£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.
Detonators: per lb.	0 0 2½	0 0 0½	20 per cent. *ad valorem.*	3 per cent. *ad valorem.*	The difference between 20 per cent. *ad valorem* and 2½d. per lb.
Carbide of Calcium: per 100 lbs.	0 2 6	0 0 6	0 5 0	0 0 6	0 2 6
Confectionery, plain or fancy, of all kinds, compounded, made or preserved with sugar: sweetened cocoa or chocolate; preserves and sweatmeats; candied or preserved ginger or chow-chow; bon-bons, surprise packets and crackers: per lb...	0 0 2½	0 0 0¼	0 0 3½	0 0 0¼	1d. per lb. or
or per £100.....................	25 0 0	3 per cent. *ad valorem.*	£30 0 0	3 per cent. *ad valorem.*	5 per cent. *ad valorem*
whichever duty shall be greater					whichever duty shall be the greater
Corn and grain:					
Wheat, ground or otherwise prepared: per 100 lbs.........	0 2 6	0 0 3	0 3 3	0 0 4	0 0 9
Maize, ground or otherwise prepared: per 100 lbs........	0 2 9	0 0 3	0 0 1¼ per lb.	0 0 0¼ per lb.	Difference between 1¼d. per lb. and 2s. 9d. per 100 lbs.
Matches:					
(*a*) Wooden: in boxes or packages of not more than 100 matches: per gross of boxes or packages.................	0 2 0	nil.	0 2 6	nil.	0 0 6
In boxes containing more than 100, but not more than 200 matches, per gross of boxes or packages.................	0 4 0	nil.	0 5 0	nil.	0 1 0
And for every 100 additional matches in boxes or packages: per gross of 100 matches.........................	0 2 0	nil.	0 2 6	nil.	0 0 6
(*b*) Fusees, vestas, or wax matches, or other patent lights used as such; in boxes or packages containing not more than 50: per gross of boxes or packages...........	0 2 0	nil.	0 2 6	nil.	0 0 6
In boxes or packages of more than 50, but not more than 100: per gross of boxes or packages....................	0 4 0	nil.	0 5 0	nil.	0 1 0
And for every 50 additional in boxes or packages: per gross of 50 matches...............	0 2 0	nil.	0 2 6	nil.	0 0 6
(Match splints to be classed and pay duty as matches).					
Milk or cream, condensed, desiccated or preserved: Full cream, per 100 lbs.......	0 5 2	0 1 0	0 10 4	0 2 0	0 5 2
Motor Spirit, namely, benzine, benzoline, naphtha (not potable) gasoline, petrol and petroleum spirit generally:					
(*a*) when not packed, per imperial gallon............	0 0 2	nil.	0 0 2	nil.	nil.
(*b*) when packed in tins, drums or other containers: per imperial gallons.......	0 0 2	nil.	0 0 3	nil.	0 0 1

Note.—The proposed additional duty on motor spirit when packed shall not be levied, collected or paid, notwithstanding the provisions of section *nineteen* of Act No. 9 of 1913, until a date to be fixed by the Governor-General by proclamation in the *Gazette*.

Part I—Customs Duties—*Continued*

Article	Present Duty	Rebate	Proposed Duty	Rebate	Increase
	£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.
Paper, wrapping, including browns, casings, sealings, nature or ochre browns, sulphites, krafts, bag papers and candle carton paper; in original mill wrappers, or in sheets, or in rolls, when the weight of the paper, at a size of 29 inches by 45 inches, or its equivalent, is not less than 30 lbs. per ream of 480 sheets; but not including greaseproof and cartridge papers	3 per cent. *ad valorem.*	The whole duty.	0 0 0⅝ per lb.	0 0 0⅛ per lb.	The difference between ⅝d. per lb. and 3 per cent. *ad valorem.*
Golden syrup, including maple syrup and treacle: per 100 lbs.	0 4 6	nil.	0 7 0	nil.	0 2 6
Rubber, manufactures of, namely:					
(*a*) pneumatic tyres and the tubes therefor:					
(i) tyres including the weight of the immediate wrapper	20 per cent. *ad valorem.*	3 per cent. *ad valorem.*	0 1 0	0 0 3 per lb.	The intention is not to increase the rate of duty payable but to change the incidence of the tax from an *ad valorem* to an equivalent rated basis.
(ii) tubes for motor vehicles other than motor cycles	20 per cent. *ad valorem.*	3 per cent. *ad valorem.*	0 0 8 per lb.	0 0 2 per lb.	
(iii) tubes for motor cycles and cycles	20 per cent. *ad valorem.*	3 per cent *ad valorem.*	0 1 0 per lb.	0 0 3 per lb.	
(*b*) tyres, solid	20 per cent. *ad valorem.*	3 per cent. *ad valorem.*	0 0 3 per lb.	0 0 1 per lb.	
Boots and shoes: per £100	20 0 0	3 per cent. *ad valorem.*	30 0 0	3 per cent. *ad valorem.*	10 per cent. *ad valorem.*
With a minimum per pair of:					
Men's	0 0 9	3 per cent. *ad. valorem*			
Women's	0 0 6				
Children's	0 0 3				
Plywood, per £100	20 0 0	3 per cent. *ad valorem.*	0 4 0 per cu. foot.	0 0 6 per cu. foot.	The difference between 4s. per cubic foot or 25 per cent. *ad valorem* and 20 per cent. *ad valorem.*
or per £100 whichever duty shall be the greater.			25 0 0	3 per cent. *ad valorem.*	
Asbestos-cement manufactures, namely:					
(*a*) plain or corrugated sheets and slates: per £100	3 0 0	The whole duty.	25 0 0	3 per cent. *ad valorem.*	22 per cent *ad valorem.*
(*b*) tiles, guttering and ridging: per £100	20 0 0	3 0 0	25 0 0	3 per cent. *ad valorem.*	5 per cent. *ad valorem.*
Bottles and jars of common glass, being ordinary trade packages, but not including marble stoppered bottles, empty: per £100	3 0 0	The whole duty.	25 0 0	3 per cent. *ad valorem.*	22 per cent. *ad valorem.*

Note.—The proposed additional duty on bottles and jars of common glass shall not be levied, collected or paid, notwithstanding the provisions of section *nineteen* of Act No. 9 of 1913, until a date to be fixed by the Governor General by proclamation in the *Gazette.*

Part I—Customs Duties—*Concluded*

Article	Present Duty			Rebate			Proposed Duty			Rebate	Increase
	£	s.	d.	£	s.	d.	£	s.	d.	£ s. d.	£ s. d.
Metal sheets:											
(a) printed, lithographed or embossed: per £100	3	0	0	The whole duty.			25	0	0	3 per cent. *ad valorem.*	22 per cent. *ad valorem.*
including											
(b) metal badges, name and number plates, and similar articles: per £100	20	0	0	3	0	0	25	0	0	3 per cent. *ad valorem.*	5 per cent. *ad valorem.*
Metal sheets: lacquered, varnished or enamelled: per £100	3	0	0	The whole duty.			20	0	0	3 per cent. *ad valorem.*	17 per cent. *ad valorem.*
Acetylene lamps: per £100	3	0	0	The whole duty.			20	0	0	3 per cent. *ad valorem.*	17 per cent. *ad valorem.*
Paints and colours, not elsewhere enumerated: per £100	20	0	0	3	0	0	25	0	0	3 per cent. *ad valorem.*	5 per cent. *ad valorem.*

Part II.—Excise Duties

Article.			Rate of Excise Duty.		
			£	s.	d.
I.—Patent or proprietary medicines sold or exposed for sale by retail; when the retail selling price of the contents of each immediately containing bottle, packet, box or other container, as the case may be, exclusive of the amount of the excise duty, does not exceed—					
	s.	d.			
	1	6	0	0	2
	2	0	0	0	3
	2	6	0	0	4
	4	0	0	0	6
	6	0	0	1	0
	10	0	0	1	6
	20	0	0	4	6
	50	0	0	10	0
over	50	0	1	0	0

Note.—"Patent or proprietary medicine" shall mean any medicine
(a) protected in the Union under current Letters Patent; or
(b) prepared; or purporting or professed to have been prepared from some secret formula; or
(c) prepared, or purporting or professed to have been prepared by some secret or occult art, whether or not the formula is or is professed to be secret; or
(d) sold under a name or trade mark registered specially in regard thereto; or
(e) sold under any description which by reason of the use of the possessive case, or otherwise, implies or indicates proprietary rights; or
(f) prepared for sale as an article of commerce, and not specially prepared or supplied in accordance with the prescription of a medical practitioner in respect of the purchaser or a member of his family or other person in his charge

Part II—Excise Duties—*Concluded*

Article	Rate of Excise Duty		
	£	s.	d.
"Medicines" shall mean any drug or other substance (other than vaccines, sera, toxins and substances of a like nature, including the so-called Dutch medicines), used or intended to be used, whether internally, externally or by injection, for the treatment or prevention of disease in man.			
II.—Perfumery, including toilet preparations (spirituous or non-spirituous), viz: powders, washes, pomatums, pastes, hair oils, and all other perfumed preparations used for the hair, mouth or skin, but not including tooth powders, tooth pastes and tooth washes, and toilet soaps and soap powders; sold or exposed for sale by retail: When the retail selling price of the contents or each immediately containing bottle, packet, box or other container, as the case may be, exclusive of the amount of the excise duty, does not exceed—			
s. d.			
1 6	0	0	2
2 0	0	0	3
2 6	0	0	4
4 0	0	0	6
6 0	0	1	0
10 0	0	1	6
20 0	0	2	6
30 0	0	4	6
50 0	0	10	0
over 50 0	1	0	0

Part III.—Increased Excise and Corresponding Customs or Surtax Duties

Article	Present Excise Duty			Present corresponding Customs or Surtax Duties			Proposed Excise Duty			Proposed corresponding Customs or Surtax Duties			Increase		
	£	s.	d.	£	s.	d.	£	s.	d.	£	s.	d.	£	s.	d.
Matches:															
(*a*) in boxes or packages of not more than 100 matches, per gross of boxes or packages	0	0	6	0	0	6	0	1	0	0	1	0	0	0	6
(*b*) in boxes or packages containing more than 100 matches, but not more than 200 matches: per gross of boxes or packages	0	1	0	0	1	0	0	2	0	0	2	0	0	1	0
And for every 100 additional matches, in boxes or packages, per gross of 100 matches	0	0	6	0	0	6	0	1	0	0	1	0	0	0	6

In connection with the dumping duty clauses of the Customs Tariff Act, the following amended provisions are to become law:—

I. In the case of goods imported into the Union of a class or kind produced or manufactured in the Union, if the export selling price, free on board, to an importer in the Union be less than that at which the same goods are sold for home consumption in the usual and ordinary course of trade, in the principal markets of the country of export, at the time of shipment, plus the free on board charges, and detriment may thereby result to a Union industry, the Governor General shall by proclamation in the *Gazette* declare that there shall (whether or not any other customs duty is payable thereon) be charged, levied, collected and paid on these goods on importation into the Union, a special customs duty (or dumping duty) equal to the difference between the said selling price to the importer and the price at which the goods are sold for home consumption as aforesaid, plus the free on board charges.

II. When any goods exported to the Union of a class or kind produced or manufactured in the Union have been or are being carried to the Union at a rate of freight which, in the opinion of the minister, is detrimental to the production or manufacture of those goods in the Union, the Governor General shall by proclamation in the *Gazette* determine a minimum rate of freight for the carriage of the goods specified, and from the countries named in such

proclamation, and there shall be charged, levied, collected and paid on those goods on importation into the Union a special duty (or dumping freight duty) equal to the difference betwen the net freight rate paid, or to be paid, and the rate determined as aforesaid.

III. A proclamation issued under sub-paragraph (1) or sub-paragraph (2) of this paragraph, shall not have force or effect in respect of goods exported from the country named therein, prior to the date of publication thereof in the *Gazette*.

It is anticipated that there will be a further amendment made at an early date in view of a recent case, Randles Bros. & Hudson *vs.* the Minister of Finance, decided at Durban, where an importing firm sued the Government for a refund of a deposit of dumping duty paid on Australian flour " pending verification of home consumption value." The court gave judgment for the plaintiffs in accordance with the legal maximum *in dubio, contra fiscum,* i.e. when in doubt decide against the Crown. This legal " doubt " will probably be removed by an amendment giving the Commissioner of Customs the final decision on the question of what is the home consumption value of any commodity at any time.

TARIFF CHANGES IN MEXICO

Mr. C. Noel Wilde, Canadian Trade Commissioner in Mexico, sends under date March 31, 1923, the following recent tariff changes of importance in that country:—

	Mexican Currency	Equal to, per pound in Canadian Currency
Laundry and common soaps..	12c. per kilo.	2.73c.
Player pianos and parts...	10 per cent ad valorem.	
Automobiles..	10 per cent ad valorem.	
Flour..	8c. per kilo.	1.72c.
Catalogues, calendars and printed advertising matter..	$2.50 per kilo.	56.8c.
Automobile tires and tubes..	$2.00 per kilo.	45.4c.
Solid tires, automobile..	$1.00 per kilo.	22.7c.

Other customs regulations impose a surtax of 50 per cent above the regular duties on all goods arriving by parcels post, and a decree dated 14th February, 1923, requires the production of a properly certified consular invoice in connection with such parcel post shipments; the operation of this decree has, however, been postponed pending the decision of the Secretaria de Hacienda (Department of Finance) as to how it is to be applied, and the penalties for non-compliance; shipments by parcel post to Mexico may therefore be forwarded without consular invoice until further notice.

POLISH MARKET FOR RUBBER FOOTWEAR

Due to climatic conditions, the Polish market for rubber galoshes is large, considering the purchasing power of the people, says the Unietd States *Commerce Reports.* In view of the extreme depreciation of the Polish mark, the good sales of Swedish galoshes (notably the Tretorn brand) at prices fully equal to if not exceeding American levels was a feature during the past winter. It is to be noted that where the above brand is for relatively unattractive and heavy models, the workmanship and materials are of the best, and each shoe carries a two-year replacement guaranty. The competition during the winter was chiefly from German and British makes of inferior quality, offered at materially lower prices. The success of the Tretorn products was probably due to a personally conducted sales and advertising campaign, while other makes were pushed only by correspondence.

SPARE PUBLICATIONS

The Department of Trade and Commerce has on hand a limited number of each of the publications herein specified, and will be glad to forward copies, so long as the supply lasts, to Boards of Trade, Chambers of Commerce, libraries, universities and schools. Applications should be addressed to The Supply Branch, Department of Trade and Commerce, Ottawa.

Alleged Employment of Aliens by the Pére Marquette Railway Company of Canada, 1905.
Australian Year Book, 1918-19-20.
Canadian Almanac, 1916-17-18-19-20-21.
Canada's Part in the Great War, 1918-19.
Canadian Parliamentary Guide, 1897, 1901, 1903, 1905, 1917-18-19.
Coal Fields of Nova Scotia, 1909.
Debates of the House of Commons, 1899, 1904, 1906-7 (Part 2); 1907-8 (Part 1-2-3).
Debates of the Senate, 1909, 1910-11.
Development of Trade Relations between Canada and Nigeria, 1916.
Dispute respecting Hours of Employment: Bell Telephone Company of Canada, 1907.
Fisheries Statistics, 1917 (Part 3).
Heaton's Annual, 1916-17-18-19.
Heaton's Exporter's Directory, 1921.
Immigration to Canada from the Orient and Immigration from India in Particular, 1908.
Industrial Disputes in the Province of British Columbia (Minutes and Evidence), 1904.
Losses Sustained by the Japanese Population of Vancouver, B.C., 1908.
Memorandum regarding National Trade and Commerce Conventions.
Need for the Suppression of the Opium Traffic in Canada, 1908.
Planing Mills, Sash and Door Factories, etc., 1917.
Railway Statistics of Canada, 1918.
Reports of Trade and Commerce from 1893-99, 1900-15.
Statesman's Year Book, 1899, 1901-8, 1913, 1919.
Titles to Land in Nigeria, 1916.
Who's Who, 1914.

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain.	†*Aquitania*	New York	May 22
" " "	-*Melita*	Montreal	" 23
" " "	†France	New York	" 23
" " "	*Montclare*	Montreal	" 25
" " "	*Empress of Britain*	Quebec	" 26
" " "	†*Mauretania*	New York	" 29
" " "	†*Lapland*	New York	" 30
" " "	*Montcalm*	Montreal	June 1
" " "	*Canada*	Montreal	" 2
Ireland only	‡*Marburn*	Montreal	May 24
"	‡*Marloch*	Montreal	May 31
France	**Antonia*	Montreal	June 2
France and other continental points	*Marglen*	Montreal	" 2
Bermuda, Leeward Islands, St. Lucia Barbados, St. Vincent, Grenada Trinidad, British Guiana, Venezuela.	*Chaleur*	Halifax	May 25
Bahamas, Jamaica, Colombia, British Honduras	**Can. Fisher*	Montreal	" 24
St. Kitts, Antigua, Barbados, Trinidad Grenada	**Can. Ottar*	Montreal	" 30
Cuba, Jamaica and Colombia	**Andalusia*	Halifax	" 24
China and Japan	*Arabia Maru*	Victoria	" 22
" " "	*President Jefferson*	Victoria	" 26
" " "	*Empress of Australia*	Vancouver	" 31
Australia	‡*Ventura*	San Francisco	" 29
Australia and New Zealand	*Niagara*	Vancouver	June 1

‡ Letter and Paper mail only - Papers, Parcel Post and specially addressed correspondence only.

Note.—The *Melita* and *Empress of Britain* will also be used for direct mail for the continent including direct Parcel Post to France.

† Letter mail only. * Parcel post and specially addressed correspondence only.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING MAY 8, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement of the nominal closing quotations for all the principal exchanges for the week ending May 8, 1923. Those for the week ending May 1 are also given for the sake of comparison.

			Parity	Week ending May 1, 1923	Week ending May 8, 1923
Britain	£	1.00	$4.86	$4.7288	$4.7047
France	Fr.	1.	.193	.0687	.0676
Italy	Lire	1.	.193	.0499	.0494
Holland	Florin	1.	.402	.3986	.3987
Belgium	Fr.	1.	.193	.0592	.0583
Spain	Pes.	1.	.193	.1562	.1553
Portugal	Esc.	1.	1.08	.0458	.0459
Switzerland	Fr.	1.	.193	.1847	.1837
Germany	Mk.	1.	.238	.000033	.000028
Greece	Dr.	1.	.193	.0122	.0165
Norway	Kr.	1.	.268	.1754	.1721
Sweden	Kr.	1.	.268	.2727	.2713
Denmark	Kr.	1.	.268	.1903	.1900
Japan	Yen	1.	.498	.4996	.5049
India	R.	1.	2s.	.3224	.3213
United States	$	1.	$1.00	1.0196	1.0200
Mexico	$	1.	.498	.4970	.4959
Argentina	Pes.	1.	.424	.3721	.3697
Brazil	Mil.	1.	.324	.1108	.1083
Roumania	Lei	1.	.198	....	....
Jamaica	£	1.	4.86	4.7453	4.7226
British Guiana	$	1.	1.		
Barbados	$	1.	1.		
Trinidad	$	1.	1.		
Dominica	$	1.	1.		
Grenada	$	1.	1.	.9814—.9820	.9785—.9792
St. Kitts	$	1.	1.		
St. Lucia	$	1.	1.		
St. Vincent	$	1.	1.		
Tobago	$	1.	1.		
Shanghai, China	Tael	1.	.708	.7749	.7701
Batavia, Java	Guilder	1.	.402	.3925	.3914
Singapore, Straits Settlements	$	1.	.567	.5608	.5610

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Quebec, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1588. Flour and Cereals.—An Italian concern would like to be put in touch with Canadian exporters of flour and cereals.

1589. Wheat Flour, Cereals and Seeds.—A firm in Milan would be willing to import the foregoing from Canada.

1590. Flour and Cereals.—A Milan house would like to communicate with Canadian exporters of the foregoing.

1591. Flour.—A firm in Hamburg wish to act as selling agents for a Canadian flour-milling concern.

1592. Flour, Sugar and Wheat.—An Italian importer would like to be put in touch with Canadian houses handling flour, sugar and wheat.

1593. Cheese.—A firm in Hamburg wish to get into touch with Canadian exporters of cheddar cheese, full cream with a view to resale to Czecho-Slovakia and other countries.

1594. Evaporated Milk.—A responsible Bristol firm of importers, closely allied with large chocolate manufacturers, is desirous of receiving quotations from Canadian manufacturers of evaporated milk not already shipping to this district.

1595. Condensed Milk.—A Bristol firm of brokers desire quotations for sweetened machine-skimmed condensed milk; also in bulk 5 to 6 cwt. barrels.

1596. Sugar of Milk.—A reliable import company of Shanghai would like to receive samples of sugar of milk, together with quotations c.i.f. Shanghai.

1597. Seeds.—Well-established commission and consignment agent of Antwerp wishes to receive offers from Canadian firms for the following:—poppy seed (blue), mustard seed (yellow), caraway seed and bird seed.

1598. Food Products.—A Belgian commission agent, established 1896, wishes to receive offers for food products from Canadian firms.

1599. Canned Goods.—An aggresive agent in Singapore with good European connections, would like to have c.i.f. quotations and sample tins of canned pilchards and herrings, also canned raspberries, strawberries, peaches, gallon apples and pears. Samples are essential.

1600. Canned Goods.—A London company who are extending their canned goods department, ask to be placed in communication with Canadian canners of salmon, fruits and vegetables, seeking sole distributing agents in the United Kingdom.

1601. Lobster, Canned.—A prominent Bristol firm of brokers desire quotations from Canadian packers, not brokers, of canned lobster in 250-case lots.

1602. Lobsters, Canned.—A leading Hamburg provision firm seek connections with Canadian exporters of canned lobsters with a view to re-export to other countries.

1603. Salmon, Canned.—A Hamburg firm are desirous of forming connections with Canadian exporters of canned salmon principally with a view to re-export to other Central European countries.

1604. Codfish.—An agent in Messina, of good standing, wishes to get in touch with Canadian exporters of codfish, and would act as consignee agent or deal on joint account.

1605. Codfish.—An old-established firm in Messina, Italy, is interested in the importation of Gaspé shore codfish and is anxious to be put in touch with Canadian exporters.

1606. Fish and Fruit.—A Rio de Janeiro firm wish to hear from Canadian exporters of dried salt codfish, canned salmon and lobster, and fresh and canned fruit.

1607. Canned Meats.—A firm in the Bristol area desire quotations for canned beef and mutton, 6's, as well as canned tongues for supply to the ship store trade.

1608. Canned Fruits and Tomatoes.—A Bristol firm of brokers desire quotations for canned fruits of all kinds and tomatoes. Prefer dealing with canners direct.

Miscellaneous

1609. Pharmaceutical Specialities.—A firm in Naples would like to be put in touch with Canadian houses trading in pharmaceutical specialities.

1610. Pharmaceutical Specialities and Hygienic Perfumeries.—A Milan company dealing in the foregoing would like to be put in touch with Canadian exporters.

1611. Pharmaceutical Products.—A Turin company are anxious to open up a business connection with a Canadian firm exporting pharmaceutical products.

1612. Chemicals and Raw Materials for Industries.—A reliable firm in Milan would like to communicate with Canadian houses handling the foregoing.

1613. Chemical, Greases for Soap Industry and Malt.—A Turin firm would like to import the foregoing from Canada.

1614. Chemicals.—A concern in Turin inquires for Canadian chemicals.

1615. Chemicals for Industries and Chemical Oils are requested by a Turin firm.

1616. Jalap Root.—An importing house in Florence would like to receive offers for Jalap root.

1617. Sulphate of Ammonia.—An active agent in Singapore would like to be put in touch with Canadian exporters of sulphate of ammonia.

1618. Soaps and Liquid Disinfectants.—An Italian concern wish to import the foregoing from Canada.

1619. Flour, Leather, and Tinplate.—A Genoa firm would like to import the foregoing from Canada and are desirous of representing a leading Canadian firm dealing in leather.

1620. Newsprint and Industrial Chemicals.—A Japanese house located in Singapore is interested in importing newsprint, etc. The same firm will be glad to have quotations on industrial chemicals (acetic acid, sulphuric acid, ammonia, caustic soda, etc.).

1621. Woollen Coatings.—One of the largest British importers of woollen piece goods in Shanghai would like to receive samples of woollen coatings with quotations c.i.f. Shanghai.

1622. Felt Hats.—A well-established English Singapore agent would like to receive samples and c.i.f. prices of Canadian felt hats, colours black and pearl grey.

1623. Asphalt Fibre Conduits.—A firm in Christiania are interested in the importation of asphalt fibre conduits used in connection with electrical armoured underground cables. Prices, terms, etc.

1624. Automobile Supplies and Mechanics' Tools.—A London Company wish to secure the agency of Canadian manufacturers of automobile supplies and also mechanics' tools.

1625. Birch Planks and Logs.—A firm in London are anxious to get in touch with a first-class shipper of birch planks and logs from the Quebec district.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From Montreal

To Avonmouth.—Caledonian, White Star-Dominion Line, May 19; Irishman, White Star-Dominion Line, May 26.

To Liverpool.—Coracero, Cunard Line, May 31; Montlaurier, Canadian Pacific Steamships, Ltd., May 18; Megantic, White Star-Dominion Line, May 19; Montclare, Canadian Pacific Steamships, Ltd., May 25; Irishman, White Star-Dominion Line, May 26.

To Dundee.—Comino, Furness-Withy Co., Ltd., May 22.

To Glasgow.—Cassandra, Anchor-Donaldson Line, May 17; Marburn, Canadian Pacific Steamships, Ltd., May 24; Gracia, Anchor-Donaldson Line, May 25; Marloch, Canadian Pacific Steamships, Ltd., May 31.

To London.—Welland County, I.C. Transports, Ltd., May 15; Bothwell, Canadian Pacific Steamships, Ltd., May 19; Andonia, Cunard Line, May 19; Canadian Commander, Canadian Government Merchant Marine, Ltd., May 23; Batsford, Canadian Pacific Steamships, Ltd., May 26; Valacia, Cunard Line, May 26; Lord Dufferin, I.C. Transports, Ltd., May 28.

To London and Antwerp.—Canadian Commander, May 23; Canadian Planter, June 6; Canadian Conqueror, June 20—all of the Canadian Government Merchant Marine; Lord Dufferin, I.C. Transports, Ltd., May 28.

To Southampton.—Melita. Canadian Pacific Steamships, Ltd., May 23; Empress of Britain, Canadian Pacific Steamships, Ltd., May 28.

To Manchester.—Manchester Shipper, May 17; Manchester Division, May 24; Manchester Brigade, May 31; Manchester Hero, June 7—all of the Manchester Lines, Ltd.

To Cardiff and Swansea.—Canadian Mariner, May 18; Canadian Explorer, June 1; Canadian Leader, June 15—all of the Canadian Government Merchant Marine.

To Newcastle and Leith.—Cairnmona, Thomson Line, May 25.

To Hull.—Comino, Furness-Withy Line, May 22.

To Belfast.—Rathline Head, May 25; Torr Head, May 31—both of the Head Line.

To Cork.—Carrigan Head, Head Line, May 30.

To Dublin.—Melmore Head, Head Line, May 23.

To Norwegian Ports.—Idefjord, May 19; Trondkilmsfjord, May 19; Fordefjord, June 15—all of the Norwegian-American Line.

To Rotterdam and Hamburg.—Essex County, I.C. Transports, Ltd., May 23; Seattle Spirit, Rogers & Webb, May 24; Kenbane Head, Head Line, May 30.

To Hamburg.—Essex County, I.C. Transports, Ltd., May 23; Seattle Spirit, Rogers & Webb, May 24; Kenbane Head, Head Line, May 30.

To Copenhagen.—Pennsylvania, Scandinavian-American Line, about May 20; Arkansas, Scandinavian-American Line, about June 20.

To Copenhagen, Gothenburg, Christiania, Helsingfors and Other Scandinavian and Baltic Ports.—Hickman, Sprague Lines, May 15; Aledo, Sprague Lines, June 15; Pennsylvania, Scandinavian-American Line, May 20.

To Antwerp.—Canadian Commander, Canadian Government Merchant Marine, May 23; Melita, Canadian Pacific Steamships, Ltd., May 23; Brecon, Canadian Pacific Steamships, Ltd., May 30.

To South American Ports: Rio de Janeiro, Santos, Montevideo, and Buenos Aires.—Hesperia, May 25; Hilarius, June 20—both of the Houston Lines.

To Havre.—Welland County, I.C. Transports, Ltd., May 15; Essex County, I.C. Transports, Ltd., May 20; Lisgar County, I.C. Transports, Ltd., May 27.

To South African Ports.—Benguela, Elder-Dempster Line, May 15.

To New Zealand and Australia.—Waimate, New Zealand SS. Co., May 20 (to Australia only); Canadian Pioneer, May 26; Canadian Cruiser, June 26—both of the Canadian Government Merchant Marine, Ltd.

To Bermuda, Barbados, Trinidad and Demerara.—Bedwyn, Canadian Pacific Steamships, Ltd., May 23—via Sydney, N.S.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—Canadian Fisher, May 24; Canadian Forester, June 14—both of the Canadian Government Merchant Marine.

To St. Kitts, Antigua, Barbados, Trinidad and Demerara.—Canadian Carrier, May 16; Canadian Otter, May 30; Canadian Runner, June 13—all of the Canadian Government Merchant Marine.

To St. John's (Nfld.), via Charlottetown.—Canadian Sapper, Canadian Government Merchant Marine, May 31 and June 21.

To St. John's (Nfld.).—Canadian Sapper, Canadian Government Merchant Marine, May 26; Sachem, Furness, Withy & Co., May 12, and fortnightly sailings.

From Quebec

To Liverpool.—Montlaurier, Canadian Pacific Steamships, Ltd., May 18; Megantic, May 19; Irishman, May 26—both of the White Star-Dominion Line.

To Southampton.—Empress of Britain, Canadian Pacific Steamships, Ltd., May 26.

To Cherbourg.—Empress of Britain, Canadian Pacific Steamships, Ltd., May 26.

From St. John

To Rio de Janeiro, Santos, Montevideo and Buenos Aires.—Hesperia, Houston Line, May 25.

From North Sydney, N.S.

To Newfoundland.—Kyle, Newfoundland Government Railway Commission, tri-weekly (Tuesday, Thursday and Saturday).

From Halifax

To Liverpool (via Newfoundland).—Sacha, Furness, Withy & Co., Ltd., May 14.

To Bermuda, St. Kitts, Antigua, Montserrat, Dominica, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad and British Guiana.—Royal Mail Steam Packet Co., May 11 and every fortnight.

From Vancouver

To Yokohama, Kobe and Nagasaki.—Arizona Maru, Osaka Shosen Kaisha, May 18.

To Kobe, Shanghai, Hong Kong and Manila.—Grace Dollar, Canadian Robert Dollar Co., June 10.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Empress of Russia, Canadian Pacific Steamships, Ltd., May 17; Yokohama Maru, Nippon Yusen Kaisha, May 17.

To Yokohama, Kobe, Moji, Shanghai and Manila.—Manila Maru, Empire Shipping Co., June 6.

To Yokohama, Kobe, Shanghai and Hong Kong.—President Jackson, Admiral Oriental Line, May 14; Empress of Australia, Canadian Pacific Steamships, Ltd., May 31.

To Yokohama, Kobe, Moji and Shanghai.—Manila Maru, Osaka Shosen Kaisha, June 6.

To Yokohama, Kobe, Moji, Shanghai, Hong Kong (also calls at Dairen, Manchuria).—Africa Maru, Osaka Shosen Kaisha, June 12.

To Yokohama, Kobe, Moji, Dairen, Shanghai and Hong Kong.—Arizona Maru, Osaka Shosen Kaisha, May 21; Africa Maru, Empire Shipping Co., June 12.

To India.—Canadian Winner, Canadian Government Merchant Marine, June 20.

To Auckland, Melbourne and Sydney.—Hauraki, Canadian-Australasian Royal Mail Line, May 21; Waiotapu, first week in June.

To Auckland, Sydney, Melbourne and Adelaide.—Canadian Traveller, Canadian Government Merchant Marine, May 25; Canadian Scottish, Canadian Government Merchant Marine, June 20.

To Wellington, Melbourne, Adelaide and Sydney.—Waiotapu, Canadian-Australasian Royal Mail Line, June 3.

To Yokohama and Kobe.—Toyooka Maru, Nippon Yusen Kaisha, May 31; Toyama Maru, Nippon Yusen Kaisha, June 20; Hakata Maru, Nippon Yusen Kaisha, July 13.

To Yokohama, Kobe and Shanghai.—Canadian Prospector, Canadian Government Merchant Marine, May 30; Canadian Transporter, Canadian Government Merchant Marine, June 30.

To Yokohama, Kobe, Hong Kong and Manila.—Tyndareus, Blue Funnel Line, May 26; Protesilaus, Blue Funnel Line, June 14; Achilles, Blue Funnel Line, July 12.

To Honolulu, Suva, Auckland and Sydney.—Niagara, June 1; Makura, June 29—both of Canadian-Australasian Royal Mail Line.

To Napier, New Plymouth, Lyttleton and Dunedin.—Waihemo, Canadian-Australasian Line, May 24.

To Liverpool, London, Rotterdam and Antwerp.—Loch Katrine, Royal Mail Steam Packet Co., second half of May; Loch Goil, Royal Mail Steam Packet Co., late June, early July.

To Rotterdam, London and Antwerp.—Drechtydyk, Royal Mail Steam Packet Co., first half of June.

To Supe, Chicama, Callao, Mollendo, Arica, Guayaquil and Corinto.—Regulus, Latin-American Line, about May 25.

To Salina Cruz, San Jose de Guatamala, Balboa, Amapala, Corinto, and such other ports as cargo inducements offer.—Senaloa, Latin-American Line, May 20.

To Manchester (via Panama Canal).—Howick Hall, Manchester Lines, Ltd., June 6.

From Victoria

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Australia, Canadian Pacific Steamships, Ltd., May 31.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Yokohama Maru, Nippon Yusen Kaisha, May 16; Empress of Russa, Canadian Pacific Steamships, Ltd., May 17; Kaga Maru, Nippon Yusen Kaisha, June 12; Empress of Asia, Canadian Pacific Steamships, Ltd., June 14; Iyo Maru, Nippon Yusen Kaisha, June 30; Shidzuoka Maru, Nippon Yusen Kaisha, July 16.

To Honolulu, Suva, Auckland and Sydney.—Niagara, June 2; Makura, June 30—both of the Canadian-Australasian Royal Mail Line.

To Yokohama, Kobe, Shanghai, Hong Kong and Manila.—President Jefferson, Admiral Oriental Line, May 26; President Grant, Admiral Oriental Line, June 7.

To Yokohama, Kobe, Moji, Dairen, Shanghai, Manila and Hong Kong.—Arabia Maru, Osaka Shosen Kaisha, May 22.

To Yokohama, Kobe, Moji, Shanghai and Manila.—Manila Maru, Osaka Shosen Kaisha, June 16.

To Manila (via Oriental Ports).—Admiral, Pacific Steamship Company, every twelve days, May 2, etc.

To Yokohama, Kobe, Nagasaki, Shanghai, Manila and Hong Kong.—Yokohama Maru, Nippon Yusen Kaisha, May 16.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Kaga Maru, June 12; Iyo Maru, June 30—both of the Nippon Yusen Kaisha.

To Yokohama, Kobe, Moji, Wairen, Shanghai and Hong Kong.—Arizona Maru, Osaka Shosen Kaisha, May 29.

HIGH COST OF HIDES CURTAILS BRITISH LEATHER PRODUCTION

The production and sale of leather, both sole and upper, has reached a very unprofitable basis, and in many quarters there is some anxiety, says the *Yorkshire Post.* Hides are now substantially higher than in pre-war days, in spite of the fact that the output of leather is larger than the demand. Quotations for sole bends are very unstable, and the input of hides is being curtailed. The market for Indian kips is firmer, but sales of the leathers made therefrom are less than normal. The principal upper leathers selling are glaces and suede.

PAPER AND PULP SITUATION IN CZECHO-SLOVAKIA

Paper factories in western Bohemia have recently received some new business, but are still reported to be operating on a scale not exceeding 50 per cent, says the United States *Commerce Reports.* Prices of several qualities of paper are still reported above world's market prices, and operating costs are still not in line with the readjustment demanded by the high Czecho-Slovak exchange. In Slovakia most of the paper mills are reported closed, and the industry is virtually at a standstill. The cellulose producers are in a more favourable position and are operating on export orders sufficient to keep them busy for some weeks.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

Lucien Pacaud, Secretary to the Office of the High Commissioner for Canada in London, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada, and Newfoundland, 285 Beaver Hall Hill, Montreal, Que. Telegraphic address: "Britcom."

The British Trade Commissioner (for Ontario), 24 Adelaide St. West, Toronto, Ont. Telegraphic address: "Toroncom."

The British Trade Commissioner (for British Columbia), 210 Winch Bldg., Vancouver. Telegraphic address: "Vancom."

The Officer-in-Charge, British Trade Commissioner's Office, 703 Union Bank Bldg., Winnipeg. Telegraphic address: "Wincom."

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address Canadian.*

Australia

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil

E. L. McColl. Address for letters—Caixa Postal 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China

J. W. Ross. Address for letters—P.O. Box 300. Office—Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba

Address: 400 and 401 Teniente Rey 11, Havana. (Post Office Box 1290.) *Cable Address, Cantracom.*

France

Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland

Norman D. Johnston, Zuidblaak 26, Rotterdam, *Cable Address, Watermill.*

India and Ceylon

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan

A. E. Bryan, P.O. Box 109 ; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico

C. Noel Wilde. Address for letters, Apartado Num. 126 bis, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian.*

New Zealand

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements

A. B. Muddiman, P.O. Box 121, Singapore. (Territory covers Straits Settlements. British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

Douglas S. Cole, Acting Trade Commissioner, Sun Building, Clare street, Bristol. *Cable Address, Canadian.*

Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States

Frederic Hudd, 44 Whitehall street, New York City. *Cable Address, Cantracom.*

Trade Commissioner P. W. Ward, formerly of Singapore, is at present temporarily attached to headquarters at Ottawa.

CANADIAN COMMERCIAL AGENTS

Australia

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark

C. E. Sontum, Grubbegd, N. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

Vol. XXVIII May 19, 1923 No. 1007

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

Printed by F. A. ACLAND, Printer to the King's Most Excellent Majesty

779

TABLE OF CONTENTS

Commercial Intelligence Journal

Issued Every Saturday by the Department of Trade and Commerce

Ottawa **May 19, 1923** **No. 1007**

TRADE COMMISSIONER J. E. RAY'S FORTHCOMING VISIT TO CANADA

Mr. J. E. Ray, Canadian Trade Commissioner in Manchester, sailed from Liverpool on the 18th of May for Canada with a view to undertaking a tour of the Dominion on behalf of Canadian export trade in the Manchester district, the central and one of the most populous areas in the United Kingdom. Canadian firms who desire to be brought in touch with Mr. Ray or to interview him should communicate immediately with the Director, Commercial Intelligence Service, Ottawa, in order that the necessary arrangements may be made.

BRITISH PREFERENTIAL TARIFFS APPLICABLE TO CANADIAN GOODS

Enquiries are occasionally received concerning the extent to which Canadian goods benefit by Empire preferential tariffs. The parts of the British Empire now granting a tariff preference to Canadian goods are: United Kingdom (including Northern Ireland), Irish Free State, New Zealand, Union of South Africa, Southern Rhodesia, Northern Rhodesia except Congo Basin, British Guiana, British Honduras, Trinidad, Barbados, Grenada, St. Vincent, St. Lucia, Dominica, Antigua, Montserrat, St. Kitts-Nevis, Virgin Islands, Jamaica, Bahamas, Cyprus, Samoa, and Fiji. (This subject was reviewed in *Weekly Bulletin* No. 925, October 24, 1921.) Since that article was compiled, it should be noted that New Zealand adopted a new tariff changing somewhat rates of duty under both its general tariff and its preferential tariff. West Indian duties have been, to some extent, revised upward. Fiji is an addition to the list of colonies adopting an Empire preferential tariff. (The Fiji tariff was reviewed in *Commercial Intelligence Journal* No. 938: January 23, 1922.) Since April 1, the Irish Free State has been a customs territory separate from the United Kingdom, but the British preference is not affected.

DENMARK'S IMPROVING CONDITIONS

On the whole, Denmark is steadily reverting to the normal in its economic conditions, says the *British Export Gazette*. Agriculture in particular is more satisfactory than for a long time past, and as the whole Danish economic fabric is based upon agriculture and the industries which depend upon it, the commercial situation is becoming daily more hopeful. Even last year British exports to the market were up by nearly $2\frac{1}{2}$ million sterling on the 10 millions of 1921, and the present year promises still further expansion if there is a corresponding increase in the marketing of Denmark's products.

EXPORTS FROM CANADA TO THE UNITED STATES OF PRINCIPAL COMMODITIES SUCH AS ARE PRODUCED ON CANADIAN FARMS, OR MANUFACTURED DIRECTLY FROM SUCH FARM PRODUCTS, DURING THE MONTH AND SEVEN MONTHS ENDED APRIL, 1920 to 1923; WITH UNITED STATES TARIFF RATES IN FORCE.

(COMPILED BY THE EXTERNAL TRADE BRANCH, DOMINION BUREAU OF STATISTICS)

Commodities		Month of April				Seven Months ended April				United States Tariff Rates in force		
		1920	1921	1922	1923	1920	1921	1922	1923	Prior to May 27, 1921	From May 27, 1921 to Sept. 21, 1922	Subsequent to Sept. 21, 1922
Animals (except for improvement of Stock)—												
Cattle	No.	6,660	15,531	2,346	7,799	316,277	198,266	110,292	120,510			
	$	278,968	535,686	40,492	463,534	27,696,077	14,103,323	2,043,329	3,636,540	Free	30 p.c.	(a)
Horses	No.	231	88	96	185	1,671	1,413	1,301	1,007			
	$	39,574	18,503	18,030	31,689	280,844	327,632	304,394	148,578	10 p.c.	10 p.c.	(b)
Poultry	No.	1,016	8,680	6,228	2,194	496,099	564,442	565,096	411,111			
	$	4,989	10,097	6,098	1,977	512,471	637,930	561,432	394,303	1c. per lb.	1c. per lb.	3c. per lb.
Sheep	No.	4	27	5		137,463	121,500	58,070	29,347			
	$	63	272	25		1,471,950	1,095,472	325,102	193,523	Free	(c)	$2 per head
Fruits—												
Apples, green or ripe	Brl.	20,599	32	1	34,568	237,711	12,051	393,308	96,295			
	$	54,584	228	4	149,317	817,460	60,806	2,000,704	437,944	10c. per bush.	30c. per bush.	25c. per bush.
Apples, dried	Lb.	125,756			86,000	711,829		658,754	115,200			
	$	15,245			8,700	93,775		76,092	11,620	1c. per lb.	1c. per lb.	2c. per lb.
Berries, fresh	$				2,818	31,094	28,874	46,227	62,758	½c. per qt.	½c. per qt.	1c. per lb.
Grains—												
Barley	Bush.	14	10	12,581	304 766	62,176	193	16,625	1,241,589			
	$	36	22	9,906	203,488	80,492	257	12,167	701,233	15c. per bush.	15c. per bush.	20c. per bush.
Beans	Bush.	1,208		622	29	4,377	2,723	4,143	68,542			
	$	6,207		2,487	82	21,669	11,056	13,086	208,134	25c. per bush.	$1.20 per bush.	$1.05 per bush.
Buckwheat	Bush.	17,060	18,324	6,810	34,454	16,714	219,949	95,722	238,571			
	$	27,794	21,919	7,523	30,369	118,229	254,970	80,074	198,060	Free	Free	10c. per cwt.
Oats	Bush.	558,835	394,386	179,439	453,173	2,970,340	1,492,390	1,631,599	624,918			
	$	549,696	177,852	98,626	241,541	2,607,001	803,595	780,348	329,810	6c. per bush.	6c. per bush.	15c. per bush.
Pease, whole	Bush.	4,025	11,625	6,348	6,928	51,266	55,243	102,125	146,570			
	$	26,289	34,421	21,199	13,598	327,792	271,552	340,484	378,272	10c. per bush.	10c. per bush.	60c. per bush.
Pease, split	Bush.	747	2,138		2,380	7,955	3,738	14,455	5,537			
	$	4,750	5,762		6,296	30,318	10,202	54,180	16,233	20c. per bush.	20c. per bush.	75c. per bush.
Rye	Bush.	16,116	6,339	1,672	48,600	440,789	296,672	83,024	484,815			
	$	32,794	8,628	1,678	41,000	677,707	484,297	68,291	375,460	Free	Free	15c. per bush.
Wheat	Bush.	17,852	3,003,452	14,391	5,143,304	2,260,136	43,601,999	9,275,470	14,029,993			
	$	45,677	5,290,301	19,017	6,264,093	5,362,386	92,089,524	10,391,287	15,800,029	Free	35c. per bush.	30c. per bush.
Grain Products—												
Bran, shorts and middlings	Cwt.	2,400	63,467	4,696	39,184	282,018	763,953	269,576	1,483,679			
	$	6,043	73,138	8,522	56,546	638,774	1,261,506	270,529	1,692,082	10 p.c. or Free	10 p.c. or Free	15 p.c.
Wheat Flour	Brl.	95	97,282	62,732	832,298	27,681	1,191,285	476,498	1,130,775			
	$	1,235	892,784	408,155	4,939,164	318,547	11,756,136	2,918,776	6,725,613	Free	20 p.c.	78c. per cwt.
Meats—												
Bacon, hams, shoulders and sides	Cwt.	571	219	277	65,679	7,073	2,312	573	66,457			
	$	15,823	7,746	4,698	1,290,820	185,099	84,385	26,726	1,316,401	Free	25 p.c.	2c. per lb.
Beef, fresh, chilled or frozen	Cwt.	32,324	15,868	13,048	16,923	228,818	163,661	120,088	99,995			
	$	704,298	250,583	158,249	143,602	3,863,223	2,401,160	1,307,246	1,112,942	Free	2c. per lb.	3c. per lb.

Mutton and lamb, fresh, chilled or frozen	Cwt.	2,867	317	1,109	121	43,179	40,634	55,889	12,219			
	$	69,154	7,266	11,557	2,116	956,687	1,036,487	914,448	296,450	Free	2c. per lb.	(d)
Pork, fresh, chilled or frozen	Cwt.	717	663	170	555	6,088	5,271	5,389	4,921			
	$	19,904	17,381	6,598	19,294	147,697	193,988	132,262	136,041	Free	2c. per lb.	¾c. per lb.
Pork, dry-salted and pickled	Cwt.	35	....	....	872	3,553	622	331	877			
	$	482	....	....	12,843	87,421	9,795	1,917	12,942	Free	25 p.c.	2c. per lb.
Poultry, dressed or undressed	$	2,888	17,378	10,164	56,013	113,723	478,070	694,955	605,241	2c. per lb.	2c. per lb.	6c. per lb.
Other meats, including canned meats, but excluding extracts	Cwt.	1,673	1,579	1,074	3,106	19,239	12,476	6,502	9,639			
	$	32,484	26,173	21,205	23,195	283,629	214,299	82,150	140,605	Free	25 p.c.	20 p.c.
Milk and milk products—												
Butter	Lb.	538,592	41,951	485	182,667	7,472,241	1,544,204	2,666,152	2,531,408			
	$	314,998	8,600	207	74,002	4,242,229	757,441	957,318	1,034,025	2½c. per lb.	6c. per lb.	8c. per lb.
Cheese	Lb.	71,866	4,045	277,900	610,100	3,545,902	279,439	3,212,282	2,584,700			
	$	21,478	1,694	45,391	149,830	938,409	78,543	196,619	522,054	20 p.c.	23 p.c.	(e)
Cream	Gal	43,039	48,149	80,879	89,780	301,288	434,542	806,893	660,013			
	$	63,925	68,013	131,056	177,776	185,936	695,703	1,181,510	1,258,665	Free	5c. per gal.	20c. per gal.
Milk, fresh	Gal.	80,821	58,842	20,792	30,995	1,112,821	584,797	672,462	511,672			
	$	22,346	13,651	4,585	6,686	340,818	175,258	157,340	118,647	Free	2c. per gal.	2½c. per gal.
Milk, condensed, including milk powder	Lb.	425,040	940,799	....	1,950,169	5,860,138	6,846,556	88,257	7,271,556			
	$	76,488	198,086	....	191,156	977,951	1,187,985	16,884	869,797	Free	2c. per lb.	1c.—1½c. lb.
Seeds—												
Clover seed, alsike	Bush	722	9,993	3,714	5,957	80,678	68,072	91,859	11,666			
	$	23,633	91,660	35,262	39,641	2,114,913	777,510	833,110	285,024	Free	Free	4c. per lb.
Clover seed, alfalfa and red	Bush.	23	140	1	15,135	2,821	2,112	6,701	15,504			
	$	792	1,316	16	71,263	79,052	22,310	68,141	72,354	Free	Free	4c. per lb.
Clover seed, other	Bush	861	25,461	10,011	1,759	45,862	80,308	51,112	76,302			
	$	18,387	90,358	44,057	6,618	796,502	325,693	208,391	372,890	Free	Free	(f)
Flaxseed	Bush	3,746	42,588	12,696	103,178	453,078	871,660	1,437,861	1,808,941			
	$	18,979	67,728	29,932	263,257	2,196,926	1,807,866	2,691,883	3,885,868	20c. per bush.	30c. per bush.	40c. per bush.
Grass seed	Bush	369	3,380	2,496	1,130	29,717	79,734	65,998	53,083			
	$	1,476	6,624	9,026	1,897	100,353	163,609	269,667	102,053	Free	Free	2c. per lb.
Vegetables—												
Potatoes	Bush	1,019,302	273,419	158,642	179,067	4,640,990	2,061,215	1,379,060	467,674			
	$	2,781,169	125,306	77,215	130,070	7,859,115	1,572,056	952,482	353,349	Free	25c. per bush.	50c. per cwt.
Sugar beets	Ton	....	....	....	....	7,723	11,502	10,481	11,430			
	$	....	....	....	....	70,235	103,175	63,151	56,730	5 p.c.	5 p.c.	80c. per ton
Turnips	Bush	41,102	18,798	25,048	66,469	1,963,273	1,641,028	1,571,732	1,924,017			
	$	20,845	4,466	8,531	14,111	894,009	394,658	427,957	280,791	15 p.c.	15 p.c.	12 c. per cwt.
Miscellaneous Products—												
Eggs	Doz	6,205	1,903	2,361	7,603	81,543	142,170	114,159	78,590			
	$	2,821	1,536	629	2,915	50,480	99,543	54,268	33,147	Free	Free	8c. per doz.
Hay	Ton	17,199	1,980	121	8,521	128,384	56,582	1,384	21,986			
	$	368,402	93,066	3,375	101,564	2,301,711	1,231,367	30,633	245,362	$2 per ton	$2 per ton	$4 per ton
Maple sugar	Lb.	3,583	12,046	15,872	2,596	936,735	1,228,549	1,457,626	148,562			
	$	1,252	2,637	2,756	617	268,916	287,170	112,987	34,117	3c. per lb.	3c. per lb.	4c. per lb.
Tallow	Cwt.	290	1,120	693	682	17,779	19,955	11,092	12,100			
	$	2,903	3,853	3,524	5,301	278,708	71,222	59,995	95,177	Free	Free	½c. per lb.
Wool	Lb	4,035	521,721	63,365	237,399	2,900,431	5,968,947	311,054	4,713,985			
	$	2,688	153,800	13,870	73,998	1,786,227	1,488,482	49,364	1,474,912	Free	(g)	(g)
Total value of above commodities	$	5,681,539	8,328,534	1,266,698	15,316,129	72,506,615	138,845,815	32,107,897	46,016,676			

(a) Cattle weighing less than 1,050 pounds, 1½c. per lb.; 1,050 pounds or over, 2c. per lb. (b) Horses valued at not more than $150 each, $30 per head; more than $150 each, 20 per cent (c) Sheep, one year old or over, $2 per head; less than one year old, $1 per head. (d) Mutton fresh, 2½c. per lb.; lamb, fresh, 4c. per lb. (e) Cheese, 5c. per lb. but not less than 25 per cent (f) Clover seed, crimson, 1c. per lb.; white, 3c. per lb. and other, 2c. per lb. (g) Dutiable at various rates. See *Commercial Intelligence Journal* No. 974, Sept. 30, 1922, pages 516-7.

MARKET FOR DOWELS, BROOMS AND HANDLES IN LIVERPOOL DISTRICT

Trade Commissioner J. Forsyth Smith

Liverpool, May 3, 1923.—Birch and maple dowels are lines that are freely imported into the Liverpool and North of England district, where they are extensively used in cabinet and furniture making, and in other manufactures. Maple dowels are in considerable demand, but those made of birch are most highly appreciated. This is a line of woodenware in which Swedish competition is not an important factor, and in which therefore Canadian manufacturers have an excellent opportunity of doing good business. It must be pointed out, however, that American dowels are strongly established on the market, and highly appreciated by the trade for quality and workmanship.

The diameters used are $\frac{3}{16}$-inch, $\frac{1}{4}$-inch, $\frac{5}{16}$-inch, $\frac{3}{8}$-inch, $\frac{7}{16}$-inch, $\frac{1}{2}$-inch, $\frac{9}{16}$-inch, $\frac{5}{8}$-inch, $\frac{11}{16}$-inch, $\frac{3}{4}$-inch, $\frac{7}{8}$-inch and 1-inch, and the lengths are 12-inch, 16-inch, 18-inch, 24-inch, 30-inch, 36-inch, 42-inch, 48-inch, 54-inch, 60-inch, 66-inch and 72-inch. The most popular sizes are $\frac{1}{4}$-inch and $\frac{5}{16}$-inch diameters, in 24-inch, 30-inch and 36-inch lengths, and $\frac{3}{8}$-inch, $\frac{7}{16}$-inch, $\frac{1}{2}$-inch and $\frac{5}{8}$-inch diameters, in 30-inch, 36-inch and 42-inch and 48-inch lengths. The $\frac{1}{4}$-inch and $\frac{5}{16}$-inch diameters are usually packed in bundles of 200, and the $\frac{5}{8}$-inch diameter in bundles of 100. The bundles should be firmly tied with strong string or light rope to prevent warping. Faulty packing is said to be responsible for considerable defect in this direction. The dowels should have clean-cut ends, and be free from knots and "flats."

The approximate values per 1,000 dowels c.i.f. Liverpool are as follows: $\frac{1}{4}$-inch diameter, 12-inch, 7s. 6d.; 18-inch, 11s. 6d.; 24-inch, 15s.; 30-inch, 20s.; 36-inch, 24s.; 42-inch, 29s.; 48-inch, 33s.; 60-inch, 56s.; $\frac{1}{2}$-inch diameter, 12-inch, 12s.; 18-inch, 18s.; 24-inch, 24s. 6d.; 30-inch, 34s.; 36-inch, 40s. 6d.; 42-inch, 48s.; 48-inch, 54s.; 60-inch, 91s. 6d.

BROOM HANDLES

Before the war, the broom handle business was almost entirely in the hands of American and Canadian exporters, as values were sufficiently low to prove attractive to the consumer, while the quality and finish were admittedly superior. Under present price conditions, there is a tendency on the part of the consumer to put up with an article of lower quality which is obtainable at a lower figure. As a result, a considerable business in this line is going to Sweden, the best of whose product, while still admittedly inferior, and made of less satisfactory material, is quite passable in finish and workmanship. The sizes most in demand are 48-inch by $\frac{5}{16}$-inch, 48-inch by 1-inch, 50-inch by 1-inch, and 50-inch by $1\frac{1}{16}$-inch. Swedish quotations are said to be usually from 25 to 33 per cent lower than those from transatlantic sources. An instance is given of Swedish brooms 48-inch by 1-inch, best quality, sanded, fairly free from knots and defects, offered at 17s. per gross, as against American quotations of 22s. 6d. c.i.f. Liverpool.

TOOL HANDLES

Navvy pick, fawn foot felling axe, and sledge handles made of hickory are imported in the main from the United States. Attempts have been made to introduce maple handles from Canada, but dealers are pessimistic as to the

possibility of selling these, claiming that they possess an undesirable lack of resiliency. As long as hickory is available, it has a strong preference. The best grade of handles, No. 1, all white perfect handles, is not in general demand on account of its cost. Considerable quantities of No. 2, a grade free from all defects, but inferior to No. 1, are regularly sold, but there is an even greater demand for the third or A grade, which, though it has slight defects, is quite serviceable for general use. Pick handles are called for in 36-inch, 39-inch and 42-inch lengths; fawn-foot felling axe handles should be 36-inch long, and hammer handles are in request in various lengths, increasing by 2 inches from 12-inch to 30-inch. Navvy pick handles, No. 2, 36-inch, are worth 12s. 6d. per dozen, and axe handles, 36-inch long, 9s. 6d. per dozen, c.i.f. Liverpool.

Agricultural tool handles, hay forks, rakes and shovel handles of ash and ash stems are largely imported. Hay forks and rakes should be 4 feet, $4\frac{1}{2}$ feet, 5 feet, 6 feet, 7 feet or 8 feet in length, and have diameters of $1\frac{3}{8}$ inch and $1\frac{1}{4}$ inch. Shovel handles are 4 feet, $4\frac{1}{2}$ feet, 5 feet and 6 feet in length, with a diameter of $1\frac{5}{8}$ inch, and ash stems 28-inch, 30-inch and 32-inch long with diameters of $1\frac{1}{2}$ inch and $1\frac{9}{16}$ inch.

TRADE CONDITIONS IN BULGARIA

The chronic scarcity of currency in Bulgaria, says *Kelly's Monthly Trade Review,* is still hampering trade, although, as a correspondent points out, the scarcity is not now so acute as was the case early in the New Year, as large amounts of money have been brought into the country in the shape of payment for exported goods, while at the same time very little ready cash is going abroad, as imports are on the decrease. Bulgarians deserve a compliment for doing their best to help themselves, as, the paper money printing press is not utilized excessively, the paper circulation being still maintained within the limit of 3,900,000,000 Leva. Large transactions in wheat have been carried out, and very large orders for export to the East are booked.

DOMINION OF CANADA TARIFF CHANGES, 1923-24

The following are the provisions of the Resolutions affecting the Customs Tariff, the Inland Revenue Act and amending Acts, and the Special War Revenue Act, 1915, and amending Acts, introduced in Parliament 11th May, 1923, and held to be in effect on and after the dates hereinafter mentioned:—

(*a*) Customs Tariff changes in effect on 12th day of May, 1923, in respect of goods imported or taken out of warehouse for consumption on and after that day and goods previously imported for which no entry for consumption was made before that day.

(*b*) Changes in Inland Revenue Act, as respects Cigarettes, in effect on the 12th May, 1923;

As respects the Repeal of Section 378, Excise Tax on Sugar produced in Canada from Sugar Beets, in effect from 1st January, 1923.

(*c*) Changes in Special War Revenue Act, 1915, and amending Acts, in effect 1st August, 1923—except the provision proposed by Section 2 of the Resolution, *re* Excise Tax on Wines of all kinds except sparkling wines, etc., to come into effect on a date to be fixed by Proclamation of the Governor in Council.

Resolutions

1. Resolved, That the Customs Tariff, 1907, be amended by repealing section five, and substituting therefor the following:—

> 5. That the importer of goods entitled to the benefits of the British Preferential Tariff shall be entitled to a discount of ten per centum on the amount of duty computed under such Tariff, when such goods are conveyed without transhipment from a port of a country enjoying the benefits of the British Preferential Tariff into a sea or river port of Canada.
>
> Provided, however, that this discount shall not apply to duties on any of the following articles, viz: wines, malt liquors, spirits, spirituous liquors, liquid medicines and articles containing alcohol, sugar, tobacco, cigars and cigarettes.
>
> Provided further that this discount shall not apply in the case in which the duty does not exceed fifteen per centum ad valorem, or, in the case of a specific duty or a specific and ad valorem duty combined in which the computed rate does not exceed fifteen per centum ad valorem, or to goods admitted into Canada which have the benefit of reductions provided for in the Canada-West Indies Trade Agreement, 1920.

2. Resolved, That the Customs Tariff, 1907, be further amended by adding after section eight A the following as sections 8B and 8C:—

> 8B. The Governor in Council may authorize any Minister of the Crown to enter into negotiations with any authorized representative of the Government of the United States with a view to the making of a commercial agreement between the two countries on terms that may be deemed mutually beneficial. Any agreement so made shall be subject to the approval of the Parliament of Canada.
>
> 8C. If the President of the United States, under authority of the United States Tariff Act of 1922, determines to reduce by fifty per cent the duties imposed by such Act on the following articles, that is to say:
>
> Cattle; wheat; wheat flour; oats; barley; potatoes; onions; turnips; hay; fish as enumerated in Paragraphs 717, 718, 719 and 720 of the said Tariff Act of 1922, the Governor in Council may by Order in Council make such reductions of duties on similar articles imported into Canada from the United States as may be deemed reasonable by way of compensation for such reductions on Canadian products imported into the United States.

3. Resolved, That Schedule A to the Customs Tariff, 1907, as amended by Chapter sixteen of the Statutes of 1910, by Chapter twenty-six of the Statutes of 1914, by Chapter five of the Statutes of 1914 (second session), by

Chapter forty-seven of the Statutes of 1919, by Chapter twenty-seven of the Statutes of 1921, by Chapter nineteen of the Statutes of 1922, and by Order in Council, be further amended by striking thereout tariff items: 83a, 99, 134, 135, 143a, 168, 235, 242, 281, 328, 348b, 365, 374, 386, 441a, 442, 469, 586, 638a, 670, 690a, 710b, the several enumerations of goods respectively, and the several rates of duties of Customs, if any, set opposite each of said items, and to repeal section 1 (i) of Order in Council, P.C. 16/1556, dated fifth day of June, 1912, designated as item 760 of the Customs Tariff, and to provide that the following items, enumerations and rates of duty be inserted in Schedule A:—

Tariff Items	—	British Preferential Tariff	Intermediate Tariff	General Tariff
72a	Hemp seed for agricultural purposes	Free	Free	Free
83a	Potatoes when imported from a country which imposes a customs duty on potatoes grown in Canada, per one hundred pounds	20 cents	35 cents	35 cents
99	Prunes and dried plums, unpitted, per pound	½ cent	⅔ cent	⅔ cent
99b	Raisins and dried currants, per pound	Free	3 cents	3 cents
134	All sugar above number sixteen Dutch standard in colour, and all refined sugars of whatever kinds, grades or standards, not covered by tariff item No. 135, when not exceeding eighty-eight degrees of polarization, per one hundred pounds	83 cents	$1.50	$1.50
	when exceeding eighty-eight degrees but not exceeding eighty-nine degrees, per one hundred pounds	85 cents	$1.53	$1.53
	when exceeding eighty-nine degrees but not exceeding ninety degrees, per one hundred pounds	87 cents	$1.55	$1.55
	when exceeding ninety degrees but not exceeding ninety-one degrees, per one hundred pounds	89 cents	$1.58	$1.58
	when exceeding ninety-one degrees but not exceeding ninety-two degrees, per one hundred pounds	91 cents	$1.62	$1.62
	when exceeding ninety-two degrees but not exceeding ninety-three degrees, per one hundred pounds	93 cents	$1.65	$1.65
	when exceeding ninety-three degrees but not exceeding ninety-four degrees, per one hundred pounds	95 cents	$1.68	$1.68
	when exceeding ninety-four degrees but not exceeding ninety-five degrees, per one hundred pounds	97 cents	$1.70	$1.70
	when exceeding ninety-five degrees but not exceeding ninety-six degrees, per one hundred pounds	99 cents	$1.74	$1.74
	when exceeding ninety-six degrees but not exceeding ninety-seven degrees, per one hundred pounds.	$1.01	$1.77	$1.77
	when exceeding ninety-seven degrees but not exceeding ninety-eight degrees, per one hundred pounds	$1.03	$1.80	$1.80
	when exceeding ninety-eight degrees but not exceeding ninety-nine degrees, per one hundred pounds	$1.09	$1.89	$1.89
	when exceeding ninety-nine degrees, per one hundred pounds	$1.09	$1.89	$1.89
	Provided that refined sugar shall be entitled to entry under the British Preferential Tariff upon evidence satisfactory to the Minister of Customs and Excise, that such refined sugar has been manufactured wholly from raw sugar produced in the British colonies and possessions, and not otherwise. Provided further that sugar imported under this item shall not be subject to special duty when the home consumption value at the place of shipment direct to Canada is more than eight cents per pound.			

Tariff Items	——	British Preferential Tariff	Inter-mediate Tariff	General Tariff
135	Sugar above number sixteen Dutch standard in color when imported by a recognized sugar refiner, for refining purposes only, under regulations by the Minister of Customs and Excise; and sugar, n.o.p., not above number sixteen Dutch standard in colour, sugar drainings or pumpings drained in transit, melado or concentrated melado, tank bottoms, sugar concrete, and molasses testing over fifty-six degrees and not exceeding seventy-six degrees, when not exceeding seventy-six degrees of polarization, per one hundred pounds....................	35·00 cents	81·08 cents	81·08 cents
	when exceeding seventy-six degrees but not exceeding seventy-seven degrees, per one hundred pounds...	35·50 cents	83·116 cents	83·116 cents
	when exceeding seventy-seven degrees but not exceeding seventy-eight degrees, per one hundred pounds...	36·00 cents	85·152 cents	85·152 cents
	when exceeding seventy-eight degrees but not exceeding seventy-nine degrees, per one hundred pounds...	36·50 cents	87·188 cents	87·188 cents
	when exceeding seventy-nine degrees but not exceeding eighty degrees, per one hundred pounds..	37·00 cents	89·224 cents	89·224 cents
	when exceeding eighty degrees but not exceeding eighty-one degrees, per one hundred pounds.......	37·50 cents	91·260 cents	91·260 cents
	when exceeding eighty-one degrees but not exceeding eighty-two degrees, per one hundred pounds..	38·00 cents	93·296 cents	93·296 cents
	when exceeding eighty-two degrees but not exceeding eighty-three degrees, per one hundred pounds...	38·50 cents	95·332 cents	95·332 cen
	when exceeding eighty-three degrees but not exceeding eighty-four degrees, per one hundred pounds...	39·00 cents	97·560 cents	97·560 cen
	when exceeding eighty-four degrees but not exceeding eighty-five degrees, per one hundred pounds...	39·50 cents	99·788 cents	99·788 cents
	when exceeding eighty-five degrees but not exceeding eighty-six degrees, per one hundred pounds...	40·00 cents	$1·02016	$1·02016
	when exceeding eighty-six degrees but not exceeding eighty-seven degrees, per one hundred pounds...	40·50 cents	$1·04244	$1·04244
	when exceeding eighty-seven degrees but not exceeding eighty-eight degrees, per hundred pounds	41·00 cents	$1·06664	$1·06664
	when exceeding eighty-eight degrees but not exceeding eighty-nine degrees, per one hundred pounds...	41·50 cents	$1·09084	$1·09084
	when exceeding eighty-nine degrees but not exceeding ninety degrees, per one hundred pounds....	42·00 cents	$1·11888	$1·11888
	whenexceeding ninety degrees but not exceeding ninety-one degrees, per one hundred pounds.......	42·50 cents	$1·14692	$1·14692
	when exceeding ninety-one degrees but not exceeding ninety-two degrees, per one hundred pounds ..	43·00 cents	$1·17496	$1·17496
	when exceeding ninety-two degrees but not exceeding ninety-three degrees, per one hundred pounds...	43·50 cents	$1·20300	$1·20300
	when exceeding ninety-three degrees but not exceeding ninety-four degrees, per hundred pounds.	44·00 cents	$1·23104	$1·23104
	when exceeding ninety-four degrees but not exceeding ninety-five degrees, per one hundred pounds....	44·50 cents	$1·25908	$1·25908
	when exceeding ninety-five degrees but not exceed-ninety-six degrees, per one hundred pounds........	45·00 cents	$1·28712	$1·28712
	when exceeding ninety-six degrees but not exceeding ninety-seven degrees, per on hundred pounds	45·50 cents	$1·31516	$1·31516
	when exceeding ninety-seven degrees but not exceeding ninety-eight degrees, per one hundred.... pounds...	46·00 cents	$1·34320	$1·34320

Tariff Items	—	British Preferential Tariff	Intermediate Tariff	General Tariff
	over ninety-eight degrees, per hundred pounds.....	46·50 cents	$1·4250	$1·4250
	Provided that all raw sugar, including sugar specified in this item, the produce of any British Colony or possession, shall be entitled to entry under the British Preferential Tariff, when imported direct into Canada from any British country.			
	Provided that sugar imported under this item shall not be subject to special duty.			
143a	Cigarettes, the weight of the paper covering to be included in the weight for duty, per pound........ and	$4.10 25 p.c.	$4.10 25 p.c.	$4.10 25 p.c.
168	Malt flour containing less than fifty per cent in weight of malt; also extract of malt, fluid or not, including grain molasses—all articles in this item upon valuation without British or Foreign excise duties, under regulations by the Minister of Customs and Excise................................per pound and	2 cents 35 p.c.	2 cents 35 p.c.	2 cents 35 p.c.
208b	Bisulphate of soda or nitre cake.....................	Free	Free	Free
208c	Dehydrated sulphate of copper for agricultural or spraying purposes................................	Free	Free	Free
235	Liquorice paste not sweetened......................	10 p.c.	15 p.c.	17½ p.c.
235a	Liquorice in rolls and sticks, not sweetened..........	15 p.c.	20 p.c.	22½ p.c.
242	Dry red lead, orange mineral, zinc white and white oxide of antimony................................	Free	7½ p.c.	10 p.c.
267b	Crude petroleum not in its natural state ·7900 specific gravity or heavier at 60 degrees temperature, when imported by oil refiners to be refined in their own factories, per gallon.........................	3/10 cent	4/10 cent	6/10 cent
281	Fire Brock for use in the construction or repair of a furnace, kiln or other equipment of a manufacturing establishment................................	5 p.c.	7½ p.c.	10 p.c.
328	Spectacle and eyeglass frames, and metal parts thereof, n.o.p..	15 p.c.	17½ p.c.	20 p.c.
328a	Metal parts, unfinished, for the manufacture of spectacle and eyeglass frames....................	Free.	5 p.c.	5 p.c.
348b	Brass and copper scrap..............................	Free	Free	Free
	But nothing shall be deemed brass or copper scrap except waste or refuse brass or copper fit only to be remanufactured in furnaces.			
365	Composition metal and plated metal, in bars, ingots, or cores, for the manufacture of watch cases, jewellery, filled gold and silver seamless wire and for dental purposes............................	5 p.c.	7½ p.c.	10 p.c.
374	Iron or steel scrap, wrought, being waste or refuse, including punchings, cuttings or clippings of iron or steel plates or sheets having been in actual use; crop ends of tin plate bars, or of blooms, or of rails, the same not having been in actual use, per ton..	25 cents	45 cents	50 cents
	But nothing shall be deemed scrap iron or scrap steeel except waste or refuse iron or steel fit only to be remanufactured in rolling mills or furnaces; provided that articles of iron or steel, damaged in transit, if broken up under customs supervision and rendered unsaleable except as scrap, may be entered for duty as scrap.			
386	Rolled iron or steel, and cast steel, in bars, bands, hoop, scroll, strip, sheet or plate of any size, thickness or width, and steel blanks for the manufacture of milling cutters, when of greater value than three and one-half cents per pound......................	5 p.c.	12½ p.c.	12½ p.c.

Tariff Items	—	British Preferential Tariff	Intermediate Tariff	General Tariff
441a	Typewriters and parts thereof	17½ p.c.	22½ p.c.	25 p.c.
442	Printing presses, lithographic presses, and type making accessories therefor, also machines specially designed for ruling, folding, binding, embossing, creasing, or cutting paper or cardboard, sheet feeding machines, when for use exclusively by printers, bookbinders and by manufacturers of articles made from paper or cardboard—including parts thereof composed wholly or in part of iron, steel, brass or wood; machinery and complete parts thereof for printing by photographic methods on plates for use on lithographic and offset presses	5 p.c.	10 p.c.	10 p.c.
448c	Stumping machines and complete parts thereof	10 p.c.	15 p.c.	15 p.c.
467a	Machinery, of a class or kind not made in Canada, and parts thereof, for the manufacture of fish meal, stock and poultry food and fertilizers, from fish and and the waste thereof	Free	Free	Free
469	Well-drilling machinery and apparatus, and parts thereof, of a class or kind not made in Canada, drawn or seamless iron or steel tubing over four inches in diameter, for drilling for water, natural gas and oil, and for prospecting for minerals, not to include motive power	Free	Free	Free
502a	Staves of wood, n.o.p., not less than five-eights of an inch in thickness, further manufactured than sawn or split but not further manufactured than listed	10 p.c.	12½ p.c.	15 p.c.
542b	Fabrics of cotton or other fibre including cord fabric, for use in the manufacture of pneumatic tires	15 p.c.	17½ p.c.	20 p.c.
583a	Artificial silk yarns or filaments or artificial fibre silk yarns or filaments produced from a form of cellulose obtained by chemical processes, not more advanced than singles, not coloured; artificial silk tops and waste or artificial fibre silk tops and waste produced from a form of cellulose obtained by chemical processes	10 p.c.	12½ p.c.	15 p.c.
583b	Artificial silk yarns, n.o.p., threads or twists or artificial fibre silk yarns, n.o.p., threads or twists, produced from a form of cellulose obtained by chemical processes, coloured or not	17½ p.c.	22½ p.c.	25 p.c.
583c	Artificial silk fabrics or artificial fibre silk fabrics produced from a form of cellulose obtained by chemical processes or of which artificial silk or artificial fibre silk is the component part of chief value, n.o.p	17½ p.c.	27½ p.c.	30 p.c.
583d	Manufactures of artificial silk or of artificial fibre silk produced from a form of cellulose obtained by chemical processes or of which artificial silk or artificial fibre silk is the component part of chief value, n.o.p	30 p.c.	35 p.c.	37½ p.c.
586	Coal, anthracite and lignite; anthracite and lignite coal dust; coke	Free	Free	Free
611b	Specially constructed boot or appliance made to order for a person having a crippled or deformed foot or ankle	Free	Free	Free
638a	Hat sweats; hatters' tips and sides when cut to shape. The articles in this item when imported by hat and cap manufacturers for use exclusively in the manufacture of hats and caps in their own factories	Free	Free	Free
663a	Cyanamid or lime nitrogen	Free	Free	Free

Tariff Items	—	British Preferential Tariff	Intermediate Tariff	General Tariff
670	Emery wheels; carborundum wheels and stones, n.o.p.; manufactures of emery or of carborundum.	$17\frac{1}{2}$ p.c.	$22\frac{1}{2}$ p.c.	25 p.c.
670a	Carborundum wheels or stones not further manufactured than moulded and burned...............	10 p.c.	$12\frac{1}{2}$ p.c.	15 p.c.
672a	Sticks or canes cut into suitable lengths for umbrella, parasol or sunshade or walking sticks, further manufactured than in tariff item 672 but not further finished than bent, when imported by manufacturers of umbrellas, parasols, sunshades or walking sticks for use exclusively in the manufacture of such articles in their own factories.....	10 p.c.	$12\frac{1}{2}$ p.c.	15 p.c.
690a	Casual donations from abroad sent by friends, and not being advertising matter, tobacco, articles containing spirits or merchandise for sale—when the duty otherwise payable thereon does not exceed one dollar in any one case, under regulations by the Minister of Customs and Excise..........	Free	Free	Free
710	(*b*) Usual coverings containing goods, not machinery, subject to any ad valorem duty, when not included in the invoice value of the goods they contain..	15 p.c.	20 p.c.	20 p.c.
	(*bb*) Usual coverings containing machinery subject to any ad valorem duty, when not included in the invoice value of the goods they contain..	$7\frac{1}{2}$ p.c.	15 p.c.	20 p.c.

4. Resolved, That Schedule B to the Customs Tariff, 1907, as amended by chapter twenty-six of the Statutes of 1914, by chapter forty-seven of the Statutes of 1919, chapter nineteen of the Statutes of 1922, and by Order in Council, be further amended by striking thereout tariff items 1029, 1030, and the enumerations of goods, and the rates of drawback of customs duties set opposite to each of the said items, and to repeal Order in Council P.C. 17/846, dated the twenty-first day of April, 1922, and to provide that the following items, enumerations and rates of drawback of customs duties be inserted in said Schedule B.

Tariff Item	Goods	When Subject to Drawback	Portion of Duty (Not including Special Duty or Dumping Duty) Payable as Drawback
1029	Materials..................................	When imported by manufacturers of hat sweats and hatters' tips and sides and used in the manufacture of such articles in their own factories....................	99 p.c.
1030	Materials..................................	When used in the manufacture of articles enumerated in tariff item 236........................	50 p.c.
1031	Sugar not above number sixteen Dutch standard in colour, sugar drainings or pumpings drained in transit, melado or concentrated melado, tank bottoms, sugar concrete and molasses testing over fifty-six degrees and not exceeding ninety-six degrees of polarization.	When used exclusively in the manufacture of syrups and molasses enumerated in tariff item 140, not to include syrup and molasses produced in the process of refining sugar. Provided, however, that such drawback shall not be paid unless the claims as presented by a manufacturer at any one time aggregate twenty-five dollars..	30 p.c.

Tariff Item	Goods	When Subject to Drawback	Portion of Duty (Not including Special Duty or Dumping Duty) Payable as Drawback
1032	Oil	When used in the manufacture of manila rope, not exceeding one and one-half inches in circumference, when used exclusively in the fisheries	99 p.c.
1033	Glass tubing	When used for the manufacture of glassware and other scientific apparatus for laboratory work in public hospitals	99 p.c.
1034	Barilla or soda ash	When used in the manufacture of sal soda	99 p.c.
1035	Machinery, and parts thereof, and dies valued at more than five hundred dollars each, of a class or kind not made in Canada.	When used in manufacturing or producing goods of a class or kind not manufactured or produced in Canada prior to the twelfth day of May, 1923	60 p.c.
1036	Materials, including all parts not finished.	When used in the manufacture of goods enumerated in tariff item 448c	40 p.c.
1037	Copper in blocks, ingots, pigs or bars	When used in the manufacture of rods for use only in the manufacture of trolley, telegraph and telephone wires, electric wires and electric cables	99 p.c.

5. Resolved, That any enactment founded on the foregoing resolutions shall be deemed to have come into force on the twelfth day of May, one thousand nine hundred and twenty-three, and to have applied to all goods mentioned in the foregoing resolutions imported or taken out of warehouse for consumption on and after that day, and to have applied to goods previously imported for which no entry for consumption was made before that day.

Inland Revenue

1. Resolved, That it is expedient to amend The Inland Revenue Act, chapter fifty-one of the Revised Statutes of Canada, 1906, as amended by chapter six of the Statutes of 1914, chapter twenty-eight of the Statutes of 1918 and chapter twenty-seven of the Statutes of 1922 by repealing paragraphs (*g*) and (*h*) of section two hundred and seventy-nine thereof and substituting therefor the following:—

(*g*) On cigarettes made from raw leaf tobacco or any substitute therefor, weighing not more than three pounds per thousand, six dollars per thousand;

(*h*) On cigarettes made from raw leaf tobacco or any substitute therefor, weighing more than three pounds per thousand, eleven dollars per thousand.

2. Resolved, That any enactment founded on the preceding resolution shall be deemed to have come into force on the twelfth day of May, one thousand nine hundred and twenty-three.

3. Resolved, That it is expedient to amend The Inland Revenue Act, chapter fifty-one of the Revised Statutes of Canada, 1906, as amended by chapter twenty-seven of the Statutes of 1922, by repealing section 378 thereof.

4. Resolved, That any enactment founded on the preceding resolution shall be deemed to have come into force on the first day of January, one thousand nine hundred and twenty-three.

Special War Revenue

Resolved, That it is expedient to introduce a measure to amend *The Special War Revenue Act, 1915,* and amending acts and to provide:

1. That the maximum amount of stamp tax payable on a cheque, bills of exchange, promissory note, advance on securities, overdraft, receipt by a person for money paid to him by a bank chargeable against a deposit of money in the bank to his credit, express company's money order or traveller's cheque, or post office money order be reduced to one dollar.

2. That after a date to be fixed by proclamation of the Governor in Council the excise tax on wines of all kinds, except sparkling wines, containing not more than forty per centum of proof spirit be reduced to seven and one-half cents per gallon, and the excise tax on champagne and all other sparkling wines be reduced to one dollar and fifty cents per gallon.

3. That the existing provisions respecting tax on sales be amended by providing for the imposition of a consumption or sales tax of six per centum on the sale price of all goods produced or manufactured in Canada, including the amount of excise duties when the goods are sold in bond, the tax to be payable by the producer or manufacturer at the time of the sale thereof by him, and of a like tax upon the duty paid value of imported goods, the tax to be payable by the importer, or transferee who takes the goods out of bond, at the time when the goods are imported or taken out of warehouse for consumption, subject to the following conditions, that is to say:

(1) A manufacturer or producer who produces goods to the value of ten thousand dollars or more during any fiscal year shall take out an annual license, the fee therefor not to exceed two dollars; the Minister may direct that a manufacturer or producer, who does not manufacture or produce goods to the value of ten thousand dollars a year, and who uses a substantial portion of goods which are exempt from the tax in the manufacture of goods which are liable to the tax, shall take out a license and shall be subject to the same conditions as the licensed manufacturer or producer.

(2) A wholesaler or jobber who sells not less than thirty per cent of his total sales of goods to a licensed manufacturer or producer to be used in articles to be produced for sale, may be granted an annual license, the fee therefor not

to exceed two dollars. Such licensed wholesaler or jobber shall give security that he will keep proper accounts and render true statements of sales to licensed manufacturers or producers and pay any tax imposed by the said Act.

(3) The said tax shall be payable by a licensed wholesaler or jobber at the time of the sale by him to other than a licensed manufacturer or producer of goods the price of which shall include the amount of excise duties, if sold in bond, or the price of which shall be the duty paid value thereof, if imported.

(4) The taxes imposed by sections 16A, 19B, 19BB and 19BBB of The Special War Revenue Act shall apply to goods sold or imported by:

(i) His Majesty in the right of His Majesty's Government of Canada;

(ii) His Majesty in the right of His Majesty's Government of any province of Canada, for the purpose of resale;

(iii) Any railway operated by or under the authority of the legislature or the Lieutenant Governor in Council of any province;

(iv) Any commission, board or public utility which is operated by or under the authority of the legislature or Lieutenant Governor in Council of any province.

(5) The said consumption or sales tax shall not be payable in the following cases, that is to say:

(*a*) on goods exported; or

(*b*) on sales by a licensed manufacturer or producer to another licensed manufacturer or producer of goods to be used in the production of articles for sale; or

(*c*) on goods imported by a licensed manufacturer or producer to be used in the production of articles for sale; or

(*d*) on goods sold by a licensed manufacturer or producer to, or on goods imported by, a licensed wholesaler or jobber whose sales are to be accounted for in accordance with the provisions of paragraph two of section three of this Resolution.

(6) A manufacturer or producer who does not produce goods of a value over ten thousand dollars a year, unless he comes under the provisions of paragraph one of section three of this Resolution, shall not pay the said consumption or sales tax on goods produced by him, but he shall pay the tax on importations.

(7) A refund of the amount of the said consumption or sales tax may be granted in the following cases, that is to say:

(*a*) to a wholesaler, jobber or other dealer on goods sold to a licensed manufacturer or producer to be used in articles produced for sale; or with the consent of the wholesaler, jobber or dealer a refund or deduction may in the like case be granted to a licensed manufacturer or producer; or

(*b*) to a licensed manufacturer or producer or a licensed wholesaler or jobber, in respect of goods on hand on the 1st of August, 1923, and which are to be used in the production of articles for sale, no refund to be allowed in respect of goods on hand after the 31st of December, 1923; or

(*c*) on goods manufactured or produced in Canada when satisfactory evidence is produced that such Canadian goods are at a disadvantage by reason of the fact that like goods may be imported into Canada free of duty, such refund or reduction not to exceed twenty-five per cent of the said tax otherwise payable; or

(*d*) on imported goods on which customs duties have been refunded on exportation; or

(*e*) to a manufacturer, producer, wholesaler, jobber or other dealer, of taxes paid under sections 16A, 19B, 19BB, 19BBB of the said Act on goods sold to His Majesty in the right of any province when His Majesty in such right is exempt from taxes in respect of such goods.

(8) That the " duty paid value " of any article be defined as meaning the value of the article as it would be determined for the purpose of calculating an ad valorem duty upon the importation of same into Canada under the laws relating to the customs and the customs tariff whether such article be in fact subject to an ad valorem or other duty or not, and in addition the amount of the customs duties, if any, payable thereon.

Provided that in computing the " duty paid value " of tea purchased in bond in the United Kingdom the amount of the customs duty payable on tea for consumption in the United Kingdom shall not be included in the value of such tea for purposes of this Act, 12-13 Geo. V, c. 47, s. 12 Am.

4. That Schedule I to the said Act be amended by striking thereout the items respecting confectionery and beverages.

5. That Schedule II to the said Act be amended by striking thereout the item respecting beverages and by adding to the said Schedule the following item:

" Carbonic acid gas in cylinders, per pound..................one cent."

6. That the provisions of the said Act respecting stamp tax on receipts be amended by providing:

(i) That paragraph (*b*) of subsection four of section fourteen of the said Act as enacted by said chapter forty-seven be amended to read as follows:

(*b*) a receipt or document in the nature of a receipt which is taxable under section twelve of this Act.

(ii) By adding provisions for the better enforcement of said section fourteen.

7. That the provisions of this resolution, except the provision proposed by section two, shall come into force on the first day of August, 1923.

GERMAN MARKET FOR LUMBER

Trade Commissioner L. D. Wilgress

Hamburg, April 24, 1923.—An investigation into the timber trade with Germany has not revealed any great present possibilities for the sale of Canadian lumber to this market. Business has been done both before and after the war in Douglas fir from British Columbia, but this has been almost entirely for the requirements of the shipbuilding industry. The sale of Eastern Canadian lumber to the German market is chiefly influenced by the accessibility of supplies of similar woods from Scandinavia, Finland, Russia, and the Baltic States. There are also large forest areas in Germany comprising about one-quarter of the total area. These forests are regularly exploited and provide the bulk of the timber used in the country. Nevertheless the total imports of wood into Germany before the war averaged about one-half those of Great Britain. However, owing to the existence of large forested areas in Germany itself and in neighbouring countries, the openings for North American lumber are largely restricted to those classes of wood which have special qualities or of which there is a scarcity in Europe.

Fairly large quantities of pitch pine are imported from the southern United States. There is also a steady sale for the leading American hardwoods. Douglas fir would appear to be the only Canadian wood well known on the market. It was reported that some red pine was received from Eastern Canada before the war. Maple was also used to a certain extent for flooring. Some clear spruce was imported for boatbuilding purposes. At the present time there is a limited trade being done in figured birch from the province of Quebec. This is imported in blocks for furniture making, but usually through Liverpool in small lots.

The following table taken from trade statistics for 1912 giving the imports of all kinds of pine wood in metric tons by countries of origin will illustrate the pre-war sources of Germany's timber supplies:—

Country of Origin	Metric Tons
Russia	518,240
Sweden	482,196
United States	380,909
Finland	248,671
Austria Hungary	220,656
Roumania	39,841
Holland	20,842
Norway	19,620

DOUGLAS FIR

Douglas fir or Oregon pine was regularly imported into Germany before the war for use as decking or for certain constructional purposes when special strength was required. Unfortunately it is not possible to give any figures of the pre-war imports of this wood. Since the Armistice, Douglas fir has been used in the shipbuilding industry to the extent of a few shipments a year. Several of the vessels built on reparation account required decking of Douglas fir. On the larger passenger boats this wood is also being used for decking, but on many of the steamers recently constructed plain deals have been used for this purpose owing to the high price of wood in Germany. Douglas fir boards are also used for various purposes in the shipbuilding industry, but the quantities are not large. The result of this demand for shipbuilding purposes is to cause spasmodic inquiries for Douglas fir or Oregon pine in lots of about 100,000 feet board measure. Since the war the bulk of the business appears to have been handled by commission agents representing timber brokers in England.

The usual sizes of Douglas fir lumber imported for the use of the shipbuilding industry range as follows:—

Decking.—2-inch by 5-inch, 2½-inch by 5-inch, and 3-inch by 5-inch in lengths of from 26 to 40 feet (8 to 12 metres.)

Planks.—2-inch by 11-inch, 2½-inch by 11-inch, 3-inch by 11-inch, and 13 to 26 feet in length to be cut up locally into deckings.

Boards.—1-inch, 1½-inch, 1¾-inch, 2-inch, 3-inch, and 4-inch by 11-inch and upwards in width and 12 feet in length.

POSSIBILITIES OF INCREASED SALE

It has been thought that Douglas fir might be imported to supplant the extended use of pitch pine from the Southern States. Pitch pine is used chiefly in Westfalia and along the Rhine for exterior work, sash, doors, etc. It is about ten per cent dearer than Douglas fir, and the practice of exporters filling orders from a number of mills leads often to lack of uniformity in quality. On the other hand it has not been found possible to induce those using pitch pine lumber to accept any other wood as a substitute. It is valued on account of its resinous and good keeping qualities and ease of working. Importers are therefore sceptical as to the possibility of Douglas fir being able to supplant pitch pine in the near future, although it was pointed out that, with the increasing shortage of exportable surplus supplies of pitch pine from the United States, German users would gradually have to adopt substitutes for this wood.

The increased use of Douglas fir for constructional purposes also does not offer any great prospects in the immediate future. Before the war Douglas fir was favoured to a certain extent for building purposes where special strength was required, such as in the erecting of factories, mills, etc. It should be remembered, however, that timber is not used to any great degree in Germany for heavy constructional purposes, and that therefore the possibility of obtaining Douglas fir lumber in large specifications is not the factor of such importance as in the case of other markets where wood is more generally used.

ACCESSIBILITY OF BALTIC SUPPLIES

The prospects for the sale of Eastern Canadian spruce and other lumber to the German market are chiefly influenced by the accessibility of large supplies of similar woods in the countries surrounding the Baltic. Sweden, Finland, Norway, the Baltic States, and Russia produce the greatest varieties of lumber to which German users have become accustomed. These countries can ship their timber cheaply and quickly to the leading German ports, from whence it is distributed through the rivers and canals to consuming centres. The system of grading lumber and the brands adopted by Baltic exporters are further factors operating against the importation of Eastern Canadian lumber at the present time. In addition to the Baltic supplies, Germany also imports large quantities of pit props, sleepers and sawn lumber from Czecho-Slovakia and Austria.

METHODS OF DISTRIBUTION

The trade with Germany in overseas lumber is largely handled by commission agents or brokers. These brokers as a rule work both with timber brokers in Great Britain and direct with overseas exporters. The leading American shippers of pitch pine, cypress, and hardwoods have their representatives in Germany. In addition to the commission brokers there are the large timber merchants and dealers, who frequently import direct as well as through the commission houses. In the interior the large timber firms, who operate sawmills, also deal in imported lumber, which they buy either direct or through

the agents. The commission brokers work for a commission of 5 to 8 per cent and guarantee the accounts. The usual terms are cash against documents.

Hamburg is the chief distributing centre for North American lumber, followed by Bremen. Emden is important for the pitch pine trade and for other lumber imported for the Rhineland. For Douglas fir, Hamburg is by far the most important centre and the shipbuilding yards at Stettin, Kiel, Lübeck, and even Danzig draw their supplies from this port.

HIGH PRICES

At the present time wood prices in Germany are higher than in other countries, and while this is tending to favour importation it is also restricting the use of lumber to a great extent.

MARKET FOR CANNED FRUITS IN BELGIUM

Trade Commissioner A. S. Bleakney

Brussels, April 26, 1923.—Owing to the weakness of the franc, the import market for canned fruits is temporarily quiet. Importations from the United States, which amounted to 42,625 kg., valued at 189,365 francs, in January, fell to 18,986 kg., worth 61,611 francs, in February. During 1922 the shipments of American fruits preserved in sugar were 354,365 kg. to a value of 1,096,826 francs, or a monthly average of 29,500 kg. The principal suppliers, by weight, for February last were the United States, 18·9 tons, Great Britain, 8 tons; and Holland, 2·5 tons. In this branch of preserved fruits in sugar, the fruits most in demand in order of importance are peaches, apricots and pears. There is also a demand for canned asparagus, but none for canned apples.

In American canned fruits, a well-known mark controls the market, owing to the fact that its owners have an established office and depôt at Antwerp, managed by an agent with a fixed salary who devotes the whole of his time to pushing the sale of these goods. A large stock is carried from which wholesale houses are able to draw at any time. Furthermore—and this is important —prices are quoted in Belgian francs. This service shows the competition to be met.

Canadian canned fruits, where known, are highly appreciated in Belgium, and it is the opinion of importers interviewed that Canadian firms or groups of firms should adopt similar methods to those mentioned, i.e. have their own organization in Belgium, carry sufficient stocks, study the peculiarities of the market and cater to them. Great emphasis is laid on advertising, as the goods will require to compete with an established mark.

The agent of a Canadian firm, who is endeavouring to introduce their goods, confirms the opinions here expressed, as does the Secretary of the Belgian Grocers' Union, a man of twenty-five years' experience on this market. This agent adds that the quality of the Canadian product is equal if not superior to the American, and that prices are slightly lower. He insists, however, that liberal samples should be supplied for extensive distribution. Three or four cases should be furnished in place of three of four cans. In regard to labels, the name of the manufacturer should be in English, but the name of the fruit should preferably be in French. This agent desires consignments of three or four hundred cases at present. A trial shipment sent forward was shipped cash against documents, but the agent claims that business can be done only on a consignment basis. Storage charges are about 30 centimes per case per month, i.e. 300 cases could be stored for about 2 francs per month.

This demand for consignments is the old expedient of passing on the risk of exchange, and it is for the Canadian exporter to decide if he will take the risk. It is the opinion of this office, however, that Canadian canned fruits cannot be sold in Belgium in competition with Californian fruit, unless the competition is met with equal facilities and service. It is not thought probable that their sale on a cash basis can succeed. Exporters, however, are advised to make the fullest inquiries through this office or the usual channels before making consignments, and are then recommended to begin with small shipments and thus feel their way. Their interests are best assured by establishing an identity of interest between themselves and the house acting as consignee.

It is not felt that much business in jams can be done in Belgium. The local products are very cheap, but, in comparison with Canadian standards, of low quality. France exports good jams into Belgium, and these are got up attractively and sold at reasonable prices. After the Armistice, English firms gained a firm footing with jams, but sales were subsequently checked by the course of exchange. To overcome this difficulty, English firms are now manufacturing their specialities in Belgium, buying their fruit and sugar within the country. The advantages of this system are evident, and the venture has been highly successful.

Only one make of Canadian jam has been found on the market and the stocks seen were remnants of post-Armistice shipments. Objection was made to this jam, however, on account of the number of stones it contained. There has been some business done in Belgium in Australian jams, but these are believed to have been old war stocks.

DUTY

The duty on canned fruit in tins weighing less than 3 kg. (6·6 pounds) is 90 fr. the 100 kg. Most Canadian and American fruits come under this category, and pay in practice 85 centimes to 1 fr. per tin (2 pounds). Under the new tariff now before the Belgian Parliament the duty will be raised to 120 fr. the 100 kg., bringing the duty on a 2 pound tin to 1·10 fr. This is on the assumption that Canada will benefit by the low tariff. Should the high tariff be applied, the duty would be 360 fr. the 100 kg. or 3·25 fr. per 2 pound tin.

MARKET FOR DOUGLAS FIR DOORS IN BELGIUM

Trade Commissioner A. S. Bleakney

Brussels, April 25, 1923.—Following an inquiry received from Victoria asking if there is a possibility of doing business in this country for good-class fir doors and submitting prices, the illustrations and prices were placed in the hands of a firm in Brussels doing a large business in these doors received from the State of Washington on the Pacific Coast. It has been ascertained that the Canadian prices were approximately the same as the prices of American doors delivered to the users in Belgium in lots of twenty. The firm in question interviewed stated that if Canadian doors could compete in price with those from the United States a considerable business could be done. This one concern was selling $10,000 worth of these doors monthly. Arrangements were made by this firm with a local contractor to build the frames and architraves for the doors of suitable material The American doors in question are made of Oregon pine and selling points advanced in their favour here are as follows:—

(1) The doors are scientifically dried and are guaranteed not to warp, bend or open at the joints, even in cases of extreme dampness.

(2) They are totally free from knots.

(3) All the panels are made of three-ply with the grains opposed, to a thickness of 8 millimetres, are of a single piece, finished on both sides, and features are made of the beauty of the grain and strength.

(4) Patented assembling of the doors by dowels is also a feature.

Illustrations of the several types of doors are shown below. Prices, as sold to the users, in lots of twenty, are also shown (prices in francs, dimensions in metres). For orders of less than twenty an extra charge of two francs per door is made.

United States firms are shipping these doors c.i.f. Antwerp, cash against documents. Importers in Belgium make immediate deliveries from stock to their customers and receive payment cash against receipt of merchandise.

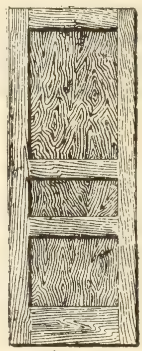
There is also a certain business to be done in window frames of the same material and the same standard construction.

Firms interested should refer to Trade Inquiry No. 1639 appearing in this number of the *Commercial Intelligence Journal* and should send prices, etc., to the firm in question. If possible, manufacturers of the doors themselves should write, giving their lowest prices, in order to offer effective competition.

A.

B.

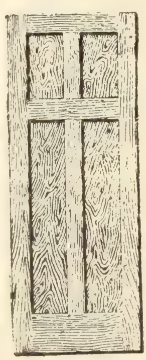
C.



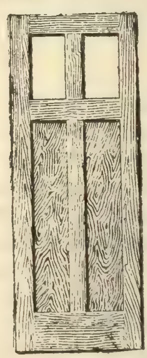
D.

E.

F.



G.



Dimensions in Metres	A	B	C	D	E	F	G
	Fr.	Fr.	Fr.	Fr.	Fr.	Fr.	Fr.
2.03×0.81×6/4	68	67	68	72	72	70	70
1.93×0.71×5/4	65	65	66	70	70	68	68
1.83×0.61×5/4	63	63	64	68	68	66	66

TRADE CONDITIONS IN BELGIUM

Trade Commissioner A. S. Bleakney

Brussels, May 1, 1923.—The local demand for metallurgical products has diminished until at present there is practically no business being done on the Bourse. Previous prices are maintained in the absence of orders, but for firm orders it is believed that much lower prices could be obtained.

The dangerous scarcity of coke is being offset by purchases of coking coal from England, thanks to which the Belgian ovens are able to work to 80 per cent of their capacity. The coal mines are going through a very prosperous period, and are reported to have made greater profits in the last three months than during the whole of the last year.

Certain metal construction works are threatening to partially close down for lack of orders. House building still continues to boom, and the brick and small building construction trades benefit accordingly. The textile and glass outlook in general is good, heavy export orders being reported.

The cost of living continues to rise. The index for fifty-nine localities on April 15, 1923, was 409 against 408 for March 15, 1923. The figure for Brussels on April 15 last was 418. On this date in the years 1920, 1921, 1922, and 1923 the figures were 461, 399, 367, and 409 respectively.

A new billion franc lottery loan for the rebuilding of the devastated areas is announced for June, 1923. The collection of taxes continues to improve, about 95 per cent of the estimates for 1922 having been collected during the year. The machinery for the collection of taxes is beginning to function seriously, and the Belgians are resigning themselves to heavy taxation, a new departure in this country.

Lloyds Bank reports that clearing-house figures reached a record point of 15,483,000,000 francs in January, 1923, exceeding the monthly average for 1922 by nearly five billion francs.

DECLINE OF UNITED STATES SHIPPING

St. John Betts, Office of the Trade Commissioner in the United States

New York City, May 10, 1923.—Only 39 per cent of the total sea commerce of the United States is transported in United States ships, according to a statement issued by the National Merchant Marine Association, as compared with 55 per cent two years ago. Foreign ships gained 707,000 tons in this period, while United States ships showed a loss of 1,150,000 tons.

The percentage of all goods imported by United States ships has fallen from 52 per cent two years ago to 27 per cent, while of the exports only 29 per cent was carried in United States bottoms as against 35 per cent. The report further states that " American shipping will continue to drift back to the insignificant position it held in world commerce before the war unless national aid is extended to the industry."

For the months of February since 1921 the tonnage carried in United States ships has become smaller. The merchandise tonnage carried in February of 1921, 1922, and 1923 in United States ships was 3,501,000 tons, 2,948,000 tons, and 2,171,000 tons respectively; for foreign ships the tonnage was 2,733,000 tons, 2,805,000 tons, and 3,440,000 tons respectively. If it were not for the fact that 70 per cent of the oil exports are still carried in United States tankers, the situation would be considerably worse. But even in the oil trade there has been

a marked decrease due to the transfer of United States tankers to the intercoastal trade.

While more than three-fourths of the total imports were brought in United States ships two years ago, less than one-half are now carried in ships of that country. The proportion both of imports and exports thus carried, it is stated, is decreasing constantly from year to year and from month to month.

TRADING POSSIBILITIES IN HOLLAND FOR CANADIAN PRODUCTS

Trade Commissioner Norman D. Johnston

Market for Packing House Products

I

[*Former reports in this series which have been published in the "Commercial Intelligence Journal" are as follows: Grain and Feeding Stuffs (No. 982); Flour (No. 984); Dried and Evaporated Apples (No. 991); Canned and Preserved Fruits and Vegetables (992); Canned Fish (No. 993); Demand for Sugar (No. 998); Syrup and Honey (No. 1000); Tinned and Powdered Milk (No. 1006).*]

Rotterdam, March 16.—Quite a large trade is done by Dutch firms in packing house products not only for sale in Holland, but in Germany and other parts of Central Europe. The statistics hardly give a true picture of the trade, for if the market in Germany, for instance, is better than in Holland at the time, delivery may take place in Hamburg and this would be shown as imports into Germany instead of into Holland, although the firm in Holland may have transacted the business. It is not by any means meant by this that most of the trade in Germany, which is by far the biggest market for packing house products, is done through Dutch firms, as there are many good old-established firms in Germany who have been doing a trade in these products for years, but the majority of the Dutch concerns are represented in Germany and German firms in Holland, so that the business is interwoven and the goods are sold where the best market is offering. The requirements of the two countries also differ, and where a certain kind of product may not be wanted in Holland, it may be desired in Germany and vice versa. The present situation in the Ruhr district is also such that hesitation is shown on the part of the Germans to buy from Belgium and France, which turns business towards Holland.

Trade in the Netherlands has therefore been very good lately in packing house products, with the exception of frozen beef, sausage casings and frozen offals, the largest sale for domestic consumption being for heavy fat backs, pure and neutral lard, and oleo oil. Frozen beef and other products, excepting casings and frozen offals for which the demand is small at present, are being sold in good quantities to Germany.

It is thought that this is a good time to enumerate in brief the position and requirements of the trade in the various kinds of packing house products so that Canadian firms may take advantage of the opportunities. The Canadian equivalents in brackets are worked out at the rate of a kilogramme equal to 2·2 pounds and a guilder equal to the par rate of 40·2 Canadian cents.

FROZEN PORK

In 1920 Holland imported 85,088 kg. (187,194 pounds) valued at 108,544 fl. ($43,634.69 at par) of frozen and refrigerated pork, while in 1921 the imports fell to 50,094 kg. (110,207 pounds) with a value of 52,723 fl. ($21,194.65), of which the Argentine supplied 21,093 kg. (46,405 pounds) and Great Britain and the United States divided most of the remainder of the trade about equally,

the former furnishing 13,256 kg. (29,163 pounds) and the latter 13,604 kg. (29,929 pounds). In 1922, however, the imports of frozen pork alone, not including refrigerated pork, rose rapidly to about 136,000 kg. (299,200 pounds) valued at 82,000 fl. ($32,964), and according to the indications during January and February the trade will be still larger this year.

The main demand is for frozen hogs and sows with the heads and feet off. In some cases the lard is left in the animal, while in others it is taken out, the preference being, however, that the lard should remain. The pigs are generally cut into two sides or are sometimes left in one piece and are wrapped in thin cloth.

FROZEN BEEF AND VEAL

During 1921 the imports of frozen beef and veal were quite heavy, when 22,488,938 kg. (49,475,664 pounds) with a value of 20,077,181 fl. ($8,071,026.76) entered Holland from outside sources. The largest amount—14,784,137 kg. (32,525,101 pounds)—was from the Argentine, and Great Britain was second with 5,766,162 kg. (12,685,556 pounds), and the United States third with 983,998 kg. (2,164,796 pounds). In 1922 the business fell off, and only about 10,865,000 kg. (23,903,000 pounds) valued at 7,072,000 fl. ($2,842,944) were imported, approximately 6,345,000 kg. (13,959,000 pounds) coming from Argentina, 4,068,000 kg. (8,949,600 pounds) from Great Britain, and most of the remainder from Belgium. The United States are not mentioned in the preliminary returns.

At present there is very little trade offering in Holland for frozen beef and veal, and this market is of little consequence just now for Canadian exporters—except for the orders which are booked for direct shipment to Germany, where there is a large trade—as there is a lack of boats with refrigerator or cold storage accommodation sailing from Canada to Holland: the only large buyers for home consumption at present are the army authorities, who only purchase about 100 tons a month. Argentine frozen beef and veal obtains the largest part of the trade. Frozen beef and veal are mostly packed in quarters.

FROZEN MUTTON

The frozen mutton trade has fallen off in Holland since 1921, when 56,480 kg. (124,256 pounds) with a value of 53,815 fl. ($21,633.63) were imported, the preliminary figures for last year showing an import of only about 10,000 kg. (22,000 pounds) valued at 7,000 fl. ($2,814). The Argentine and Great Britain were again the largest suppliers. Frozen mutton is principally packed in halves.

SALTED PORK AND BACON

As far as Canada is concerned, one of the most important lines, if not the most important, of packing house products is the trade in salted pork and bacon in Holland for home consumption and for shipment to Germany. One reason for saying this is that while since 1919, when 16,851,112 kg. (37,072,446 pounds) valued at 35,867,517 fl. ($14,418,741) were imported, the trade has not been as large as in some of the other lines, nevertheless the biggest part of the imports were United States pork and bacon, so that although Canada has done a certain amount of business there would appear to be opportunities for obtaining a greater share of the trade, providing quality and prices are competitive.

Out of a total importation in 1921 of 616,367 kg. (1,356,007 pounds) with a value of 455,194 fl. ($182,987), the United States supplied 466,436 kg. (1,026,159 pounds) valued at 347,681 fl. ($139,767), the remainder coming chiefly from Belgium, Denmark, Germany, and Great Britain. On the other

hand. Holland exported in the same year 14,290,550 kg. (31,439,210 pounds), which went mostly to Great Britain and Germany, with lesser amounts to Belgium and France. In 1922 the imports amounted to about 629,000 kg. (1,383,800 pounds) with a value of 453,000 fl. ($182,106), of which the United States furnished about 110,000 kg. (242,000 pounds) valued at 62,000 fl. ($24,924) direct. Due to the abnormal exchange and other conditions, Germany was the largest source of supply with approximately 321,000 kg. (706,200 pounds), which probably consisted in good part of United States products, as higher prices could be obtained by the German importers by selling to Holland in guilders than by selling in Germany in marks. Last year the Dutch exports, on the other hand, amounted to about 8,682,000 kg. (19,100,400 pounds), most of which went to Great Britain (7,675,000 kg. or 16,885,000 pounds) and the rest to Belgium, Germany and France.

The main demand is for dry salted fat backs. For the Dutch domestic trade the requirements are mostly for the heavy sizes such as 16/18, 18/20, 20/25 and 25/30, while for the trade to Germany the lighter weights, e.g. 8/10, 10/12 and 12/14, are wanted. The pork required is prime mess pork and mess pork, which is used considerably for feeding the crew on the smaller sailing ships.

SALTED BEEF

The United States are also the largest suppliers of salted beef to Holland, and in 1921 sent 86,018 kg. (189,240 pounds) valued at 45,861 fl. ($18,436) out of a total import of 106,065 kg. (233,343 pounds) with a value of 70,005 fl. ($28,142), most of the remainder coming from Denmark and the Netherlands East Indies. In 1922, however, the total importation dropped to about 59,000 kg. (129,800 pounds) valued at 37,000 fl. ($14,874). The decrease was probably due to the depressed shipping conditions, as the salted beef is used extensively on the smaller sailing vessels for the crews. The principal requirements are for salt pickled extra family beef and second grade or plate beef.

SALTED HORSE FLESH

It is a remarkable fact that more salted horse flesh was imported into Holland than either salted pork and bacon or salted beef during the last three years. The largest quantity comes from Great Britain, although the United States also does a good business. In 1921, out of a total importation of 866,728 kg. (1,906,802 pounds) valued at 529,534 fl. ($212,872), Great Britain supplied 576,730 kg. (1,268,806 pounds), the United States 241,542 kg. (531,392 pounds), and Ireland and Belgium small quantities. The total import of salted horse flesh in 1922 amounted to about 364,000 kg. (800,800 pounds) with a value of 169,000 fl. ($67,938).

SMOKED OR DRIED PORK AND BACON

The United States have in the past done a large trade in Holland in smoked or dried pork and bacon. In 1919 and 1920, for instance, when the Netherlands imported over 14,000,000 kg. (or about 31,000,000 pounds) and about 16¾ million kg. (or about 37,000,000 pounds) respectively, the United States supplied the greatest part.

The Dutch people are now, however, more and more smoking their own pork and bacon according to the Dutch taste, and the imports have therefore declined each year since 1920. In 1921 the imports of the smoked or dried pork and bacon amounted to 9,851,201 kg. (21,672,642 pounds) or almost only half of those in the previous year, the United States supplying 9,507,732 kg. (20,917,010 pounds); and last year they fell again about half or to 4,808,000

kg. (10,577,600 pounds), of which the United States furnished about 4,595,000 kg. (10,109,000 pounds). It would therefore seem best for Canadians to concentrate more particularly on the salted pork and bacon.

SMOKED OR DRIED BEEF

The trade in smoked or dried beef is unimportant in Holland, and it is not therefore proposed to dwell upon it, except to say that in 1921 the United States supplied 7,112 kg. (15,646 pounds) out of a total import of 7,161 kg. (15,754 pounds), which was really a big year as previous to that the trade was practically nothing, and last year it dropped to about one metric ton.

SLAUGHTER-HOUSE OFFALS

In 1920 and 1921 a fair trade was done in slaughter-house offals—e.g. lungs, livers, kidneys, etc.—of which just over 438½ metric tons were imported each year, the United States being the main source of supply with about 375 tons in 1920 and 327 tons in 1921. In 1921 Canada furnished over 8½ tons. A business was done both in Holland and in Germany, but offals, except livers, are now a prohibited import into Germany, and as the sausage and casing trade is bad in Holland the business is poor in offals. In 1922 the trade fell to about 195 metric tons of imports. When, however, the sausage trade revives there will likely be better business to be done in offals.

SWEET PICKLED OFFALS

A large part of the offals imported are sweet pickled, the largest demand being for hog livers and beef tripe. These are mostly bought in barrels of 250 pounds net.

FROZEN PIG LIVERS

Frozen pig livers have been a fairly good selling article in the past, but as far as Holland is concerned the trade is not very good just now. This, however, is likely to revive in the future. They are frozen and packed separately in layers, net 55 pounds. Prices are given per 220 pounds c.i.f. Rotterdam or Hamburg, including 2 per cent commission if an agent is appointed.

BLADDERS AND GUTS

The trade in bladders and guts is not very good at the present time, but in the past quite a good business has been done, in which many countries, including Canada, have participated. In 1921 the quantity imported was 2,555,588 kg. (5,622,294 pounds) valued at 2,052,605 fl. ($825,147). Great Britain has been the largest supplier with 936,097 kg. (2,059,413 pounds) in 1921, the United States second with 520,182 kg. (1,144,400 pounds), Germany third with 302,209 kg. (664,860 pounds), Belgium, France, and Argentina following in the order named. Canada was tenth on the list of importers with 15,997 kg. (35,193 pounds) valued at 7,836 fl. ($3,150).

In 1922 out of a total importation of about 1,766,000 kg. (3,885,200 pounds) with a value of 1,752,000 fl. ($704,300), Great Britain again led with about 613,000 kg. (1,348,600 pounds), France being second with about 383,000 kg. (842,600 pounds), Germany third with 358,000 kg. (787,600 pounds), while the United States fell to fourth place with 182,000 kg. (400,400 pounds). Canadian exports to Holland are not shown in the preliminary returns for last year but some business was done. While trade in bladders and guts is not good at the present time, it is anticipated that business will revive in the future.

CASINGS

As mentioned previously, the trade in sausage casings has been bad for some little time, which had a detrimental effect on the sale of offals, etc. Firms have been expecting that business would pick up for several months past, but there are still no signs of it. In the later years of the war and immediately succeeding hostilities a fine trade was done in which Canada participated, but since then buying has been very restricted and more or less "from hand to mouth."

The principal demand in the Netherlands is for narrow beef middles, wide hog bungs and narrow fatens. Germany is a larger market for casings than Holland, and in the past considerable buying has been done for that market. Holland also supplies Switzerland, but the Swiss are very particular and only the very best casings find a market in that country. Exports also take place through Dutch firms to various other parts of Central Europe.

HOG HEADS

There is a very nice little business being done in boneless hog heads. It is, however, most important that they should be boned out very carefully. The snouts and lips should be left on, while the ears and the interior part of the ears should be carefully taken out. Heavy hogs should be used as the minimum weight per head should be 10 pounds. They are sweet pickled and packed in tierces containing 300 pounds net. The price has been about $25 per 100 kg.

PURE LARD

Holland produces and exports so-called pure lard which it is believed is often made from white grease. The quality is therefore lower than the pure lard made in Canada or the United States. The latter country does quite a good business, and in 1921 exported to Holland 4,427,304 kg. (9,740,069 pounds) of pure lard with a value of 3,595,764 fl. ($1,445,497) out of a total importation of 5,231,922 kg. (11,510,228 pounds) valued at 4,090,107 fl. ($1,644,223). The remainder, in order of importance, came from Brazil, Great Britain, and the Argentine, with smaller quantities from Germany, France, China, and Belgium. In 1922, when the imports dropped to about 2,259,000 kg. (4,969,800 pounds), the United States furnished about 2,064,000 kg. (4,540,800 pounds), most of the small remainder coming from France and Great Britain.

It will be somewhat difficult for Canadians to get into the Dutch trade for domestic consumption to any extent as the people in Holland are very conservative; and a well-known United States brand has a very great hold on the market, obtaining a large percentage of the business. There is, however, a better opportunity of doing business with Dutch firms for shipment to Germany.

The pure lard is sold mostly in boxes of 25 kg. (55 pounds) packed in two blocks of 12½ kg. (27½ pounds) each. Each block is usually wrapped in parchment paper. The boxes should have two wire straps around the outside for shipment purposes in order to prevent any damage or leakage in case the box is placed in different temperatures. A small trade is also done in tierces of 170 kg. (374 pounds) net, and also in firkins of 50 kg. (110 pounds) net.

[The second and concluding part of this report will be published in the next issue of the *Commercial Intelligence Journal*.]

SUGAR CROP OF THE BRITISH WEST INDIES IN 1922

Trade Commissioner E. H. S. Flood

Barbados, April 24, 1923.—In 1922 the quantity of sugar exported from the British West Indies and British Guiana, including syrup equated to sugar, amounted to 267,734 tons. In the present year there will be for export, as nearly as can be estimated, approximately 290,000 tons, including equated syrup.

The following table will show the quantity of sugar and molasses exported in 1922:—

	Crystals Tons	Muscavado Tons	Syrup and Molasses Gallons
Jamaica	47,895	......	......
Trinidad	51,852	......	197,619
British Guiana	90,571	......	76,574
Barbados	29,876	3,946	7,390,409
Antigua	8.383	......	132,435
St. Kitts	8,396	212	314,791
Montserrat	......	59	2,087
St. Lucia	3,838	179	153,476
St. Vincent	......	61	120,565
Totals	240,811	4,457	8,387,956

Climatic Conditions.—Throughout the Leeward Islands, and particularly in St. Kitts and Antigua, climatic conditions during the season of 1922 were most unfavourable for growing cane, the rainfall having been some 10 or 15 inches below the average. Somewhat similar conditions prevailed in St. Lucia, where the rains were nearly 23 inches below the average. The sugar industry in St. Lucia, however, has improved in some other respects, the supply of labour for one thing having become easier. If therefore seasonable weather is experienced during the present year, good hopes are entertained for the crop to be reaped in 1923. In Trinidad the sugar crop turned out better than was expected, the sucrose content of the cane being found higher than was anticipated, and the outbreaks of the frog-hopper and other pests fewer than in recent years. Weather conditions in British Guiana were not favourable for sugar in 1922, but during the last month or two of this year some improvement has been made in this respect, and the yield of sugar so far has been fairly satisfactory. In Barbados, on the other hand, the rainfall was well distributed during the greater part of the sugar-cane growing season, and a very good crop, the largest for some years, totalling perhaps 70,000 tons, may be realized.

Barbados Molasses.—As stated above, the quantity of sugar for export will be greater than for some years. The increase in sugar shipped in 1922, as compared with the former year, was 7,477 tons, and the increase in the quantity of molasses was 2,198,938 gallons.

The following statement will show the quantity and value of the export of syrup and molasses from Barbados in 1922, together with the countries of destination:—

Countries of Destination	Quantity Gallons	Value £
Canada	5,279,307	306,058
Newfoundland	1,445,333	65,173
United States	626,911	36,501
Other Countries	38,858	2,252
Totals	7,390,409	£409,984

PRODUCTION OF PAPER IN JAPAN

Mr. A. E. Bryan, Canadian Trade Commissioner in Yokohama, writes under date April 15, 1923, that the total output of paper by the Associated Paper Mills in the month of March amounted to 61,624,000 pounds, while sales during the same period were realized to the extent of 71,223,000 pounds. Compared with February, the output shows an increase of 3,987,000 pounds, while sales advanced by 8,232,000 pounds.

Details of output and sales for the month may be recorded as follows:—

	Output lbs.	Sales lbs.
Fine printing paper	10,123,000	11,598,000
Other printing paper	8,534,000	9,385,000
Newspaper	26,500,000	29,911,000
Torinoko paper	3,833,000	4,832,000
Roll paper	1,222,000	2,105,000
Match paper	1,008,000	1,243,000
Coloured paper	487,000	879,000
Packing paper	3,709,000	4,294,000
Chinese paper	753,000	1,452,000
Miscellaneous paper	5,400,000	5,929,000
Total	61,624,000	71,223,000

IMPORTS OF FLOUR INTO HOLLAND

TRADE COMMISSIONER NORMAN D. JOHNSTON

WHEAT, FLOUR AND MEAL

Rotterdam, April 30, 1923.—Wheat, flour and meal was imported into Holland during March to the amount of 5,908 metric tons valued at about 984,000 fl. ($395,570) as compared with 7,727 tons in March, 1922, with a value of 1,442,000 fl. ($579,680), while during the first three months of this year 31,125 metric tons valued at 5,243,000 fl. ($2,107,690) were imported as against 18,232 tons with a value of 3,280,000 fl. ($1,318,560) in the same period of 1922.

The United States was by far the largest supplier, having sent 4,643 metric tons in March and 27,187 tons during the first quarter of the year. Belgium was second with 1,119 tons in March and 2,411 tons during the quarter; Canada with 721 tons was third for the quantity supplied during the three months (only 30 tons arrived during March); Germany was fourth during the quarter with 449 tons, of which 6 tons came in March; and France was fifth with 216 tons during the three months, of which 70 tons were received in March.

RYE FLOUR AND MEAL

In March about 67 metric tons of rye flour and meal valued at 10,000 fl. ($4,020) were imported into the Netherlands, as compared with 135 tons in March, 1922, with a value of 24,000 fl. ($9,648). The imports during the quarter were 255 tons valued at 40,000 fl. ($16,080), as against 259 tons with a value of 48,000 fl. ($19,300) during the first quarter of last year. The preliminary statistics do not show the countries of origin, but it is presumed that the largest part came from the United States.

CORN FLOUR AND MEAL

During the quarter Holland imported 897 metric tons of maize corn flour and meal with a value of 102,000 fl. ($41,000), in comparison with 1,553 tons valued at 182,000 fl. ($73,160) in the same period of 1922. Of the quantity

received during the three months of this year, the United States furnished 607 tons and France 200 tons. In March the United States supplied most of the imports, having shipped 198 tons out of a total importation of 229 tons valued at 28,000 fl. ($11,260). The imports of corn flour and meal in March, 1922, amounted to 546 tons valued at about 60,000 fl. ($24,120).

BUCKWHEAT FLOUR AND MEAL

The United States has supplied all the imports of buckwheat flour and meal up to the end of March this year, the amount being 30 metric tons with a value of 6,000 fl. ($2,412) in March and 271 tons valued at 52,000 fl. ($20,900) during the quarter. In 1922 the imports amounted to 259 tons valued at 62,000 fl. ($24,290) in March and 734 tons with a value of 162,000 fl. ($65,120) during the three months.

RECAPITULATION

In recapitulation the following is a table of the flour and meal imports into Holland during March and the first quarter of 1923 according to the official preliminary statistics:—

	March		January to March	
	Quantity Metric Tons	Value 1,000 Guilders	Quantity Metric Tons	Value 1,000 Guilders
Wheat, Flour and Meal—				
Total Imports	5,908	984	31,125	5,243
From Germany	6	1	449	78
" Belgium	1,119	183	2,411	396
" France	70	10	216	31
" United States	4,643	780	27,187	4,585
" Canada	30	5	721	127
Rye Flour and Meal—				
Total Imports	67	10	255	40
Corn Flour and Meal—				
Total Imports	229	28	897	102
From France	....	....	200	18
" United States	198	23	607	71
Buckwheat Flour and Meal—				
Total Imports	30	6	271	52
From United States	30	6	271	52
Rice Flour and Meal, Ground Rice or Granulated Rice—				
Total Imports	....	....	107	8

TARIFF CHANGES AND CUSTOMS REGULATIONS

Reimposition in Barbados of Customs Duties Surtax of 20 per Cent

L. M. B. Meyers, Office of Canadian Trade Commissioner

Barbados, April 28, 1923.—On April 25, 1922, an Act entitled The (Barbados) Revenue in Aid Act, 1922, was passed, imposing a surtax of 20 per cent on both the ad valorem and specific duties set out in the first schedule to the Customs Tariff Act of 1921, except those articles which were specifically exempted and set out in the Act. The Act provided that it should only remain in force until the 31st day of March, 1923, and it was then stated to be only an Act to temporarily increase the revenue derivable from customs duties. However, by the "Expiring Laws Continuance Act, 1923," which was passed on the 31st March, 1923, the Revenue in Aid Act, 1922, was included—*inter alia*—in the schedule of the continuing Acts, and was reimposed and will remain in force until the 31st day of March, 1924.

This Act was published in *Commercial Intelligence Journal* No. 962, of the 8th July, 1922, on page 87.

Section 2 (*a*) of the Act increases the duties on cotton piece goods from 6 per cent preferential and 12 per cent general to 10 per cent and 20 per cent respectively; on cotton seed to be used for expressing oil therefrom, from 2s. 6d. and 5s. per ton to 7s. 6d. and 15s. per ton, preferential and general; and on charcoal and firewood, both of which were on the free list, to 1s. and 2s. preferential and general. These articles are not subjected to the surcharge of 20 per cent.

Section 2 (*b*) sets out the list of exemptions—including the above—and reads as follows:—

" In addition to the duties at present payable, a duty after the rate of 20 per cent or one-fifth of the several rates of duty both under the British Preferential Tariff and the General Tariff shall be levied and paid on all articles liable to duties of customs except those hereunder specified, namely:—

Beer, ale and porter.
Biscuits, bread and cakes, unsweetened in barrels.
Charcoal and firewood.
Cotton piece goods.
Fish: Other kinds, dried, salted or smoked.
Grain—
 Rice.
Flour and meal—
 Wheaten or rye flour.
 Maize or cornmeal.
Pulse—
 Beans and peas, whole or split.
Oil—
 Edible.
 Kerosine for illuminating.
 Kerosine used as fuel.
Seeds for expressing oil therefrom—
 Cotton seed.
Spirits.
Tobacco and snuff
All articles under this head in the first Schedule of the Customs Tariff Act, 1921, except cigars, cheroots and cigarettes.
Worn clothing.

It should be noted that the surtax is calculated separately from the regular duties.

Duty on Gold and Silver Manufactures in Grenada

E. H. S. Flood, Trade Commissioner in the British West Indies, has forwarded a copy of a new Customs Duties Ordinance for Grenada, according to which gold and silver manufactures are made dutiable at 20 per cent ad valorem British Preferential Tariff (applicable to Canada) and 30 per cent ad valorem General Tariff.

United States Invoicing Regulations for Goods Shipped in Different Cars

Mr. M. M. Mahoney, representative at Washington of the Canadian Department of External Affairs, has forwarded copy of a new regulation issued by the United States Treasury Department relative to invoicing goods imported in different cars or different trains within a given week. A question on this matter had arisen under Article 218 of the United States Customs Regulations of 1915 and subsequent instructions. Collectors are now advised as follows: " The importations made in different cars or different trains on different dates within a certain week which may be included in one invoice must be covered by one order or contract and shipped from one consignor to one consignee. This rule necessarily excludes merchandise for various purchasers consigned to one

consignee for entry purposes, as the shipment must not only be from one consignor to one consignee but must also be covered by the same order or contract of sale."

Italian Import Duty on Two Grades Sugar Temporarily Abolished

Mr. A. E. MacEachern, Assistant Trade Commissioner, cabled from Milan, Italy, on May 10: " Import duty on sugar 1st grade, 2nd grade abolished. Is only temporary measure. Stock is low. New crop will not be ready before ninety days." (See also *Commercial Intelligence Journal* No. 957, June 3, 1922, page 904; and No. 971, September 9, 1922, page 415.)

Tariff Increases in Denmark

Mr. C. E. Sontum, Canadian Commercial Agent in Christiania, writes under date of April 25, 1923, that the Danish Parliament has resolved to increase the duty on a number of articles, including lobsters, sardines and other fish, both fresh and canned, to kroner 1 per kg. Strong opposition was manifested against the increase of duty on fish conserves, and it was especially pointed out that it was unreasonable to regard these articles as luxuries. According to the new rates, the duty will approximate 50 per cent of the value on these articles. Tires for automobiles are to be levied 10 per cent ad valorem. The new rates went into force on April 24.

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain.	† *Mauretania*	New York	May 29
" " "	† *Lapland*	New York	" 30
" " "	*Montcalm*	Montreal	June 1
" " "	*Canada*	Montreal	" 2
" " "	† *Berengaria*	New York	" 5
" " "	- *Minnedosa*	Montreal	" 6
" " "	† *Paris*	New York	" 6
" " "	*Montrose*	Montreal	" 8
" " "	*Empress of Scotland*	Quebec	" 9
" " "	*Regina*	Montreal	" 9
Ireland only	‡ *Marloch*	Montreal	May 31
"	‡ *Metagama*	Montreal	June 7
France and other continental points	*Marglen*	Montreal	" 2
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela.	*Chaleur*	Halifax	May 25
Bahamas, Jamaica, Colombia, British Honduras	* *Can. Fisher*	Montreal	" 24
St. Kitts, Antigua, Barbados, Trinidad, Grenada	* *Can. Otter*	Montreal	" 30
Cuba, Jamaica and Colombia	* *Andalusia*	Halifax	" 24
China and Japan	*Empress of Australia*	Vancouver	" 31
Australia only	‡ *Ventura*	San Francisco	" 29
Australia and New Zealand	*Niagara*	Vancouver	June 1

† Letter mail only. * Parcel Post and specially addressed correspondence only.

‡ Letter and Paper mail only. - Papers, Parcel Post and specially addressed correspondence only.

The *Minnedosa* and *Empress of Scotland* will also be used for direct mail for the Continent including direct Parcel Post to France.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING MAY 15, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement of the nominal closing quotations for all the principal exchanges for the week ending May 15, 1923. Those for the week ending May 8 are also given for the sake of comparison.

		Parity	Week ending May 8, 1923	Week ending May 15, 1923
Britain .. ..£	1.00	$4.86	$4.7047	$4.7234
France .. ..Fr.	1.	.193	.0676	.0681
Italy .. ..Lire	1.	.193	.0494	.0498
Holland .. ..Florin	1.	.402	.3987	.3992
Belgium .. ..Fr.	1.	.193	.0583	.0588
Spain .. ..Pes.	1.	.193	.1553	.1554
Portugal .. ..Esc.	1.	1.08	.0459	.0459
Switzerland.. .. .. Fr.	1.	.193	.1837	.1843
Germany .. .. Mk.	1.	.238	.000028	.000022
Greece .. .. Dr.	1.	.193	.0165	.0183
Norway .. .. Kr.	1.	.268	.1721	.1669
Sweden .. ..Kr.	1.	.268	.2713	.2720
Denmark .. .. Kr.	1.	.268	.1900	.1920
Japan .. ..Yen	1.	.498	.5049	.4999
India .. .. R.	1.	2s.	.3213	.3188
United States .. ..$	1.	$1.00	1.0200	1.0203
Mexico .. ..$	1.	.498	.4959	.4961
Argentina .. ..Pes.	1.	.424	.3697	.3685
Brazil .. .. Mil.	1.	.324	.1083	.1061
Roumania .. .. Lei	1.	.198	....	....
Jamaica .. ..£	1.	4.86	4.7226	4.7355
British Guiana .. ..$	1.	1.		
Barbados .. ..$	1.	1.		
Trinidad .. ..$	1.	1.		
Dominica.. .. ..$	1.	1.		
Grenada .. ..$	1.	1.	.9785—.9792	.9807—.9814
St. Kitts .. ..$	1.	1.		
St. Lucia.. .. ..$	1.	1.		
St. Vincent .. ..$	1.	1.		
Tobago .. ..$	1.	1.		
Shanghai, China .. ..Tael	1.	.708	.7701	.7677
Batavia, Java .. .. Guilder	1.	.402	.3914	.3928
Singapore, Straits Settlements .. $	1.	.567	.5610	.5573

FLAX GROWING IN FRANCE

While the manufacture of flax products is of some importance in the Cherbourg consular district, most of the raw material for the flax-spinning mills is obtained from outside the district. Flax culture here, as in the rest of France except the northern Departments, has declined sharply. In Calvados flax raising had entirely disappeared in 1913, but has been resumed during the past two years, and the present area is 350-500 acres. In the Manche, where 1,500 acres were planted in 1892, production has been practically abandoned. Similar conditions are disclosed in the Department of the Orne.

In 1908 the area under flax in all France was 45,000 acres; in 1913, 72,000 acres; and at the outbreak of the war it had grown to about 115,000 acres. At present the amount of land devoted to flax growing shows a shrinkage of 50 per cent from the highest pre-war acreage, while the French linen mills can consume the output of 200,000 acres, their annual requirements being 400,000 metric tons of raw flax. Notwithstanding the difference in price, French flax spinners are said to prefer the home-grown product to that of Russia.

French farmers are being urged to increase the acreage of flax on the grounds that it will give additional employment, and that 125,000 more tons of flax could be produced annually, thus retaining at home the millions of francs paid to foreign countries to keep French linen mills in operation. In addition, the utilization of the seed for oil and oilcake and the straw for paper would prove an important source of revenue.—*U.S. Commerce Reports.*

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Quebec, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1626. Flour.—A firm of commission agents of long standing in Barbados and well known to the trade would like to establish a Canadian connection with flour, in the following grades: Bakers', bleached flour, and supers. Further particulars on file.

1627. Grain and Feeding Stuffs.—A firm in Copenhagen are desirous of hearing from Canadian exporters of grain (wheat, rye, etc.), and feeding stuffs. Terms and particulars.

1628. Rye.—A firm of commission agents in Amsterdam are desirous of getting into touch with large Canadian shippers of rye, Western No. 2. They state that they do a big trade in rye and suggest that several Canadian rye shippers join together for the purpose of developing this market so that a continuity of supply may be possible, and that if necessary consignments may be sent so that a stock may be retained on the spot.

1629. Food Products.—A French firm want to act as commission agents for Canadian exporters of food products, fish, preserves, fruit, etc.

1630. Food Products.—A French firm in Havre want to act as representative and broker for Canadian exporters of canned fish, dried and canned fruits, and dry vegetables.

1631. Canned Salmon and Lobster.—A firm in Amsterdam are desirous of hearing from Canadian exporters of canned salmon and lobster. Terms, etc.

1632. Salmon, Fish Preserves.—A French firm wishes to secure the agency of a responsible Canadian exporter of salmon and of fish preserves generally.

1633. Fruit and Produce.—A young Scotsman, representing large distributing concern in fruit and produce, with branches in twenty-three important centres throughout the United Kingdom, and agencies in France and Holland, wishes to get in touch with exporters desirous of widening their markets.

1634. Evaporated Apples.—A firm in Holland would like to represent exporters of evaporated apples.

1635. Cheddar Cheese.—The Belgian branch of one of largest English importers of food products, etc., wish to receive offers of first-quality Canadian Cheddar cheese, coloured.

1636. Cheddar Cheese.—A Belgian importer desires to receive quotations for Canadian Cheddar cheese.

Miscellaneous

1637. Broom Handles.—A Liverpool firm asks for quotations on broom handles in carload lots.

1638. Dowels.—A Liverpool firm asks for quotations on birch and maple dowels in carload lots.

1639. Douglas Fir Doors.—A Belgian firm would be glad to receive prices, illustrations and specifications of standard Canadian Douglas fir doors.

as illustrated in the report appearing on page 797 of this number of the *Commercial Intelligence Journal.* This firm are also interested in receiving illustrations and prices of standard window frames of the same make.

1640. LUMBER.—A Japanese lumber broker desires to receive quotations on Douglas fir, red cedar logs, Douglas fir baby squares, thin red cedar boards, which are required in all grades, preferably merchantable. Specifications for the above may be obtained upon application to the Director, Commercial Intelligence Service, quoting file T/C-4-164. Also samples of close straight grain cedar boards of the best quality.

1641. DOMESTIC WOODENWARE, HARDWARE, ETC.—A manufacturers' agent in London, claiming a good connection both among the home and re-export trade, wishes to secure agencies for Canadian manufacturers of domestic woodenware and hardware.

1642. MACHINERY AND PLANT FOR APPLE BY-PRODUCTS.—A firm in Johannesburg are desirous of receiving complete illustrated catalogue and prices on Canadian machinery and plant for apple by-products.

1643. ORCHARD AND PACKING-HOUSE EQUIPMENT.—A firm in Cape Province, South Africa, are desirous of receiving catalogues and prices of orchard and packing-house equipment.

1644. ORES AND METALS.—A Belgian firm desires to receive quotations from Canada of ores of copper, lead, zinc, silver, cobalt, wolfram, etc., also corresponding metals.

1645.—MANGANESE ORE.—A Manchester firm are open to consider offers of manganese ore. Samples should accompany c.i.f. Manchester prices.

1646. WOOLLEN YARNS.—A large British house is open to receive samples and quotations for all kinds of knitting and weaving yarns. This is a splendid opportunity for any Canadian mill anxious for representation in Japan.

1647. KRAFT PAPER.—An important and old-established British house in Kobe asks to be put in touch with a Canadian mill manufacturing Kraft paper. Samples and full particulars requested immediately.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From Montreal

To AVONMOUTH.—Irishman, White Star-Dominion Line, May 26.

To LIVERPOOL.—Coracero, Cunard Line, May 31; Montclare, Canadian Pacific Steamships, Ltd., May 25; Irishman, White Star-Dominion Line, May 26.

To LONDON.—Canadian Commander, Canadian Government Merchant Marine, Ltd., May 23; Batsford, Canadian Pacific Steamships, Ltd., May 26; Valacia, Cunard Line, May 26; Lord Dufferin, I.C. Transports, Ltd., May 28.

To LONDON AND ANTWERP.—Canadian Commander, May 23; Canadian Planter, June 6; Canadian Conqueror, June 20—all of the Canadian Government Merchant Marine; Lord Dufferin, I.C. Transports, Ltd., May 28.

To SOUTHAMPTON.—Melita. Canadian Pacific Steamships, Ltd., May 23; Empress of Britain, Canadian Pacific Steamships, Ltd., May 28.

To MANCHESTER.—Manchester Division, May 24; Manchester Brigade, May 31; Manchester Hero, June 7—all of the Manchester Lines, Ltd.

To CARDIFF AND SWANSEA.—Canadian Explorer, June 1; Canadian Leader, June 15—both of the Canadian Government Merchant Marine.

To NEWCASTLE AND LEITH.—Cairnmona, Thomson Line, May 25.

To HULL.—Comino, Furness-Withy Line, May 22.

To DUNDEE.—Comino, Furness-Withy Co., Ltd., May 22.

To GLASGOW.—Marburn, Canadian Pacific Steamships, Ltd., May 24; Gracia, Anchor-Donaldson Line, May 25; Marloch, Canadian Pacific Steamships, Ltd., May 31.

To BELFAST.—Rathline Head, May 25; Torr Head, May 31—both of the Head Line.

To CORK.—Carrigan Head, Head Line, May 30.

To DUBLIN.—Melmore Head, Head Line, May 23.

To Havre.—Lisgar County, I.C. Transports, Ltd., May 27.

To Antwerp.—Canadian Commander, Canadian Government Merchant Marine, May 23; Melita, Canadian Pacific Steamships, Ltd., May 23; Brecon, Canadian Pacific Steamships, Ltd., May 30.

To Rotterdam and Hamburg.—Essex County, I.C. Transports, Ltd., May 23; Seattle Spirit, Rogers & Webb, May 24; Kenbane Head, Head Line, May 30.

To Hamburg.—Essex County, I.C. Transports, Ltd., May 23; Seattle Spirit, Rogers & Webb, May 24; Kenbane Head, Head Line, May 30.

To Norwegian Ports.—Fordefjord, Norwegian-American Line, June 15.

To Copenhagen.—Arkansas, Scandinavian-American Line, about June 20.

To Copenhagen, Gothenburg, Christiania, Helsingfors and Other Scandinavian and Baltic Ports.—Aledo, Sprague Lines, June 15; Pennsylvania, Scandinavian-American Line, May 20.

To St. John's (Nfld.), via Charlottetown.—Canadian Sapper, Canadian Government Merchant Marine, May 31 and June 21.

To St. John's (Nfld.).—Canadian Sapper, Canadian Government Merchant Marine, May 26, and fortnightly sailings.

To New Zealand and Australia.—Canadian Pioneer, May 26; Canadian Cruiser, June 26—both of the Canadian Government Merchant Marine, Ltd.

To South American Ports: Rio de Janeiro, Santos, Montevideo, and Buenos Aires.—Hesperia, May 25; Hilarius, June 20—both of the Houston Lines.

To Bermuda, Barbados, Trinidad and Demerara.—Bedwyn, Canadian Pacific Steamships, Ltd., May 23—via Sydney, N.S.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—Canadian Fisher, May 24; Canadian Forester, June 14—both of the Canadian Government Merchant Marine.

To St. Kitts, Antigua, Barbados, Trinidad and Demerara.—Canadian Otter, May 30; Canadian Runner, June 13—both of the Canadian Government Merchant Marine.

From Quebec

To Liverpool.—Irishman, White Star-Dominion Line, May 26.

To Southampton.—Empress of Britain, Canadian Pacific Steamships, Ltd., May 26.

To Cherbourg.—Empress of Britain, Canadian Pacific Steamships, Ltd., May 26.

From St. John

To Rio de Janeiro, Santos, Montevideo and Buenos Aires.—Hesperia, Houston Line, May 25.

From North Sydney, N.S.

To Newfoundland.—Kyle, Newfoundland Government Railway Commission, tri-weekly (Tuesday, Thursday and Saturday).

To St. John's, Nld. (via Charlottetown, P.E.I.).—Canadian Sapper, Canadian Government Merchant Marine, May 31 and June 21.

From Halifax

To Bermuda, St. Kitts, Antigua, Montserrat, Dominica, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad and British Guiana.—Royal Mail Steam Packet Co., May 25, and every fortnight.

From Vancouver

To Liverpool, London, Rotterdam and Antwerp.—Loch Katrine, Royal Mail Steam Packet Co., second half of May; Loch Goil, Royal Mail Steam Packet Co., late June, early July.

To Manchester (via Panama Canal).—Howick Hall, Manchester Lines, Ltd., June 6.

To Rotterdam, London and Antwerp.—Drechtydyk, Royal Mail Steam Packet Co., first half of June.

To Auckland, Sydney, Melbourne and Adelaide.—Canadian Traveller, Canadian Government Merchant Marine, May 25; Canadian Scottish, Canadian Government Merchant Marine, June 20.

To Honolulu, Suva, Auckland and Sydney.—Niagara, Canadian-Australasian Royal Mail Line, June 1; Makura, Canadian-Australasian Royal Mail Line, June 29.

To Wellington, Melbourne, Adelaide and Sydney.—Waiotapu, Canadian-Australasian Royal Mail Line, June 3.

To India.—Canadian Winner, Canadian Government Merchant Marine, June 20.

To Kobe, Shanghai, Hong Kong and Manila.—Grace Dollar, Canadian Robert Dollar Co., June 10.

To Yokohama, Kobe, Moji, Shanghai and Manila.—Manila Maru, Empire Shipping Co., June 6.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Australia, Canadian Pacific Steamships, Ltd., May 31; Empress of Canada, Canadian Pacific Steamships, Ltd., June 28.

To Yokohama, Kobe, Moji and Shanghai.—Manila Maru, Osaka Shosen Kaisha, June 6.

To Yokohama, Kobe, Moji, Dairen, Shanghai and Hong Kong.—Arizona Maru, Osaka Shosen Kaisha, May 21; Africa Maru, Empire Shipping Co., June 12.

To Yokohama, Kobe, Moji, Shanghai, Hong Kong (also calls at Dairen, Manchuria). —Africa Maru, Osaka Shosen Kaisha, June 12.

To Yokohama, Kobe, Hong Kong and Manila.—Tyndareus, Blue Funnel Line, May 26; Protesilaus, Blue Funnel Line, June 14; Achilles, Blue Funnel Line, July 12.

To Yokohama and Kobe.—Toyooka Maru, Nippon Yusen Kaisha, May 31; Toyama Maru, Nippon Yusen Kaisha, June 22; Hakata Maru, Nippon Yusen Kaisha, July 13.

To Yokohama, Kobe, Shanghai and Bombay.—Canadian Prospector, Canadian Government Merchant Marine, May 30; Canadian Winner, Canadian Government Merchant Marine, June 20; Canadian Transporter, Canadian Government Merchant Marine, June 30.

To Supe, Chicama, Callao, Mollendo, Arica, Guayaquil and Corinto.—Regulus, Latin-American Line, about May 25.

To Salina Cruz, San Jose de Guatamala, Balboa, Amapala, Corinto, and such other ports as cargo inducements offer.—

From Victoria

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Australia, Canadian Pacific Steamships, Ltd., May 31.

To Honolulu, Suva, Auckland and Sydney.—Niagara, June 2; Makura, June 30—both of the Canadian-Australasian Royal Mail Line.

To Manila (via Oriental Ports).—Admiral, Pacific Steamship Company, every twelve days, May 2, etc.

To Yokohama, Kobe, Shanghai, Hong Kong and Manila.—President Jefferson, Admiral Oriental Line, May 26; President Grant, Admiral Oriental Line, June 7; President Madison, Admiral Oriental Line, June 17; Empress of Canada, Canadian Pacific Steamships, Ltd., June 28.

To Yokohama, Kobe, Moji, Dairen, Shanghai, Manila and Hong Kong.—Arabia Maru, Osaka Shosen Kaisha, May 22.

To Yokohama, Kobe, Moji, Dairen, Shanghai and Hong Kong.—Africa Maru, Osaka Shosen Kaisha, June 22.

To Yokohama, Kobe, Moji, Shanghai and Manila.—Manila Maru, Osaka Shosen Kaisha, June 16.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Kaga Maru, Nippon Yusen Kaisha, June 12; Empress of Asia, Canadian Pacific Steamships, Ltd., June 14; Iyo Maru, Nippon Yusen Kaisha, June 30; Shidzuoka Maru, Nippon Yusen Kaisha, July 16.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Kaga Maru, June 12; Iyo Maru, June 30—both of the Nippon Yusen Kaisha.

To Yokohama, Kobe, Moji, Dairen, Shanghai and Hong Kong.—Arizona Maru, Osaka Shosen Kaisha, May 29.

PERSIA'S COMMERCIAL REVIVAL

The gradual improvement in Persian conditions is now so marked that every month sees a larger volume of both imports and exports, and although the adverse balance of trade is still an unsatisfactory feature of commercial activities in this market, the tendency is towards its reduction. The importation of luxuries has been prohibited, but we may point out this makes very little difference in Persia's trade, which is mainly comprised of necessities. Sugar, for instance, heads the list of imported goods, and this is followed in order of value by cotton piece goods, tea, rice, living animals, cotton thread iron and steel goods, and woollen tissues, while among other principal imports are nails and screws, machinery and implements, wearing apparel, leather goods, furniture, glassware, and paper. Such items comprise upwards of 90 per cent of the entire imports. At the same time there is a certain, if small, demand for motor cars, pure silk fabrics, jewellery, etc., which will doubtless increase as the country is economically developed. At present the only manufacturing industries are boot and shoe and button manufacture, but neither is specially successful.—*British Export Gazette.*

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

Lucien Pacaud, Secretary to the Office of the High Commissioner for Canada in London, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada, and Newfoundland, 285 Beaver Hall Hill, Montreal, Que. Telegraphic address: "Britcom."

The British Trade Commissioner (for Ontario), 24 Adelaide St. West, Toronto, Ont. Telegraphic address: "Toroncom."

The British Trade Commissioner (for British Columbia), 210 Winch Bldg., Vancouver. Telegraphic address: "Vancom."

The Officer-in-Charge, British Trade Commissioner's Office, 703 Union Bank Bldg., Winnipeg. Telegraphic address: "Wincom."

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address Canadian.*

Australia

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil

E. L. McColl. Address for letters—Caixa Postal 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China

J. W. Ross. Address for letters—P.O. Box 300. Office—Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba

Address: 400 and 401 Teniente Rey 11, Havana. (Post Office Box 1290.) *Cable Address, Cantracom.*

France

Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland

Norman D. Johnston, Zuidblaak 26, Rotterdam, *Cable Address, Watermill.*

India and Ceylon

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico

C. Noel Wilde. Address for letters, Apartado Num. 126 bis, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian.*

New Zealand

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements

A. B. Muddiman, P.O. Box 121, Singapore. (Territory covers Straits Settlements. British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

Douglas S. Cole, Acting Trade Commissioner, Sun Building, Clare street, Bristol. *Cable Address, Canadian.*

Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States

Frederic Hudd, 44 Whitehall street, New York City. *Cable Address, Cantracom.*

Trade Commissioner P. W. Ward, formerly of Singapore, is at present temporarily attached to headquarters at Ottawa.

CANADIAN COMMERCIAL AGENTS

Australia

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark

C. E. Sontum, Grubbegd, N. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

Vol. XXVIII May 26, 1923 No. 1008

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

Printed by F. A. ACLAND, Printer to the King's Most Excellent Majesty

TABLE OF CONTENTS

Commercial Intelligence Journal

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Ottawa | May 26, 1923 | No. 1008

SUBSCRIPTIONS TO THE *COMMERCIAL INTELLIGENCE JOURNAL* AND ITS ASSOCIATED PUBLICATIONS

The Department of Trade and Commerce desires to announce that, in view of the heavy expense now involved in the publication of the *Commercial Intelligence Journal*, commencing with the 1st of July next a nominal subscription price will be charged for this publication. The price therefor to addresses in Canada will be $1 per annum (single copies 5 cents each); and to addresses outside the Dominion $3.50 per annum (single copies 10 cents each).

Individuals and firms now in receipt of this publication should forward their subscriptions addressed to " The Accountant, Department of Trade and Commerce, Ottawa, Canada"; and it will be understood that those who do not forward their subscriptions before July 1 no longer desire to receive it, and their names will be removed from the mailing list.

It should be specially noted that those who pay an annual subscription will receive on request, without extra charge, the special reports issued from time to time in the form of Supplements to the *Commercial Intelligence Journal*. Those who are not on the regular mailing list may purchase these special reports at a cost of 25 cents each to addresses in Canada, and 35 cents outside the Dominion.

Remittances may be made by money or express orders, or drafts, or cheques, payable at par in Ottawa.

BRITISH EMPIRE EXHIBITION: NOTICE TO FOOD EXPORTERS

As already announced in the *Commercial Intelligence Journal*, plans for Canada's participation in the British Empire Exhibition to be held in Wembly Park, near London, England, from April 20 to October 31 next year, are practically completed.

Canada expects to have an exhibition worthy of its name. The Canadian Government exhibit will be under the direction of the Minister of Trade and Commerce, who for this purpose will have under his jurisdiction the staff of the Dominion Government Exhibition Commissioner.

This department therefore desires, as a preliminary announcement, to state that within the grounds of Wembly Park, where the great exhibition is to be

held, will be constructed the Canadian Building. The Empire Exhibition Executive will also construct a special building to be used as a restaurant, in which products of the Empire only will be used, provided they can compete successfully in quality and price with similar foreign commodities.

It is anticipated that the exhibition will be visited by millions of people and a unique opportunity will thus be afforded for manufacturers and producers of foodstuffs throughout the Empire to advertise their products to the world.

Arrangements have not yet advanced sufficiently to permit of any detailed announcement, but it is desirable that it should be known among Canadian exporters of foodstuffs that the Department of Trade and Commerce is prepared in every possible way to assist Canadian suppliers of foodstuffs throughout the period of the exhibition. For this purpose it is suggested that firms interested, and who are not now represented in London or elsewhere in the United Kingdom, should arrange to appoint agents in London, to whom all information can be provided so that on short notice during the period of the exhibition prices and supplies can be made available.

The Department of Trade and Commerce will provide a special officer detailed in London who will act as liaison officer between Canadian suppliers of foodstuffs and the authorities in charge of the restaurant.

Canadian firms, therefore, interested in supplying Canadian goods to the exhibition authorities, should communicate with The Deputy Minister, Department of Trade and Commerce, Ottawa, giving the names and addresses of their agents or jobbers in the United Kingdom and full information regarding the foodstuffs they can supply, so that arrangements may be made well in advance. The department will also welcome helpful suggestions.

AUSTRALIAN INVOICE REQUIREMENTS: NEW PUBLICATION

Mr. D. H. Ross, Canadian Trade Commissioner in Melbourne, has prepared a report entitled "Australian Invoice Requirements and Other Trade Regulations Applicable to Imports into the Commonwealth," which has just been issued as a separate publication of the Department of Trade and Commerce, in a convenient form for filing. This publication is one that should be in the hands of all Canadian exporters to Australia, as it embraces the kind of information that is essential to them in their work as exporters. Among the subjects handled in this report are: requirements under the Commonwealth (Trade Descriptions Act); marking and regulations governing the various classes of goods imported; method of computing customs valuation; forms of invoice required by the Commonwealth Customs; packing, marking and numbering of cases; how to send quotations; parcel post shipments and rates to Australia; bills of lading; marine insurance; and shipping facilities for the Canadian exporter.

Copies of this publication may be obtained free of charge by Canadian firms on application to the Director, Commercial Intelligence Service, Ottawa.

OF INTEREST TO FIRMS SELLING CUSTOMS FORMS

The Commercial Intelligence Branch of the Department of Trade and Commerce, for the information of Canadian exporters, has issued several leaflets dealing with the customs regulations of British and foreign countries in regard to invoices, certificates of origin, etc., required for goods imported into such countries. It is quite practicable in many instances for Canadian exporting firms to print their own invoice forms and necessary accompanying declarations from the information given in these leaflets. Sometimes, however, the exporter would find it more convenient and economical to purchase a number of blank forms already printed. Consequently the Commercial Intelligence

Branch is occasionally asked where blank forms may be obtained for actual use in preparing the necessary documents to cover shipments of Canadian goods sent abroad. It is desired to assist firms making inquiries of this kind. Commercial stationers and others therefore who are offering for sale any of the forms in question are invited to send their names and addresses to the Director, Commercial Intelligence Service, Ottawa, specifying the form or forms they are in a position to furnish. In doing so, quote file No. 24872.

ASSOCIATED BRITISH CHAMBERS OF COMMERCE IN CHINA AND HONG KONG

Mr. J. W. Ross, Canadian Trade Commissioner in Shanghai, writes under date of April 3, 1923, that during the annual conference of the Associated British Chambers of Commerce in China and Hong Kong which was recently held in Shanghai, the following among other resolutions were adopted:—

(1) "That this conference views with profound anxiety the continued and increasing difficulties with which foreign trade has to contend arising from the imposition of arbitrary and illegal taxation, and desire to reiterate its opinion for the need of abolition of internal taxation on merchandise as soon as a stable government has been established in China."

(2) "That mail services between the United Kingdom and the Far East have not improved equally with cargo steamer services, so that goods frequently arrive before the documents on which alone delivery can be taken; that this state of affairs is a serious handicap to business and causes heavy direct and indirect losses to traders; and that this conference resolves that the London Chamber of Commerce be asked to urge upon the postal authorities the need for improvement along the lines of developing an airship mail service from London to Marseilles, Brindisi or Port Said; the provision of a faster steamship service east of Bombay, and greater use of the Western route across North America; and that as soon as safeguards are available the trans-Siberian route be considered."

This resolution is very applicable to Canada, for most of the complaints which are received in the Shanghai office respecting shipments of goods from Canada are due to the non-arrival of the documents with the goods for some time after the letter, for as pointed out in the above resolution, when documents are from any cause delayed the banks will not release the cargo, which is put in bonded storage at the expense of the buyer until such time as the missing papers arrive. The practice of Canadian banks in selling their foreign drafts in New York also causes the latter to become separated from the other documents of the shipment, and being thus delayed in reaching this port. It not infrequently happens that the goods reach their destination some time in advance of the drafts, much to the annoyance and expense of the buyer.

(3) "That this conference protests against the arbitrary methods of the Customs service of French Indo-China; condemns the unfair discrimination practised against other than French traders by means of transit dues on goods passing through to Yunnan, and urges the British Government to make strong representations to the French Government with a view to the abolition of such dues."

(4) It will be recalled that at the Washington Conference it was agreed by the Powers that China is to be permitted to impose a surtax of 2½ per cent in addition to the present import duty of 5 per cent ad valorem on foreign goods, and that eventually, contingent upon China agreeing to abolish its internal taxation and transit taxes, an import duty of 12½ per cent would be acceptable to the Powers.

The resolution on this question—adopted after much discussion—was to the effect that proceeds of this surtax should be under the control of some responsible bureau, and should only be available to the Chinese after the Government had placed its finances upon a sound basis, and had made some effective headway towards pacifying the country and in the disbandment of its army.

THE EXPORT MANAGER'S UNDERSTUDY

The export manager who has had previous experience as a travelling salesman often feels the necessity of securing greater personal contact with his foreign customers with whom connections were built up during his years on the road. Accordingly he makes trips lasting from six to eight months into as many of the firm's foreign markets as he can conveniently cover. Now this is an excellent idea, provided the export manager can arrange matters in the home office so that business will proceed in a normal way during his absence. But this cannot be done by mapping out detailed instructions to some junior clerk, for no export manager can foresee conditions and contingencies over so long a period and provide rule-of-thumb methods for dealing with them.

What such an export manager should do is to provide himself with an "understudy," carefully trained and thoroughly familiar with conditions both in the export field and at home. He should outline to this understudy the fundamental principles and policies which are to govern the business while the export manager is away. But the question of methods should be left to the assistant. He should be empowered to make decisions, change plans, and in all other ways to have a perfectly free hand, provided only that he adheres to the general policies laid down by the export manager. For unless an assistant export manager is trained to a pitch where he can be given authority to settle detailed questions of procedure and be in a position to determine what he should do as new conditions arise in different markets, then the export manager would better remain at home.—United States *Commerce Reports*.

PRELIMINARY STATISTICS OF CANADIAN TRADE FOR 1922-23, COMPARED WITH 1920-21 AND 1921-22

(Compiled by the External Trade Branch, Dominion Bureau of Statistics.)

The publication of condensed preliminary statements of Canadian trade proved popular in business circles on both previous occasions on which it was undertaken and it is anticipated that the following tables will also be found very useful.

The figures given are for the three fiscal years ended March 31, 1921, 1922 and 1923. Those for the two former periods are revised; those for 1923 unrevised. The classifications of imports and exports have been amplified by the addition of items and the introduction of numerous sub-group totals.

More detailed statistics of imports and exports for 1921, 1922 and 1923, covering all the items of the trade classifications and all the principal countries in each case, will be published in the March issue of the Monthly Trade Report, which will be issued about May 25. (This report is mailed to subscribers at the subscription price of $2.40 per annum or 20 cents the single copy.)

The final revised statistics for the fiscal year 1923, with details of customs duties collected, will appear in the Annual Trade Report. This report will also contain comparative figures for the years 1919, 1920, 1921 and 1922. It will not be issued until about the end of 1923, and will be sent, on request, to responsible parties, without charge.

Both the Monthly and Annual Trade Reports are published by the Dominion Bureau of Statistics.

PRELIMINARY STATISTICS OF CANADIAN TRADE, 1922-23

1.—Summary of the Trade of Canada, by Main Classes, during the Fiscal Years ended March 31, 1921, 1922 and 1923; with Portions Imported from and Exported to the United Kingdom and the United States

Classes	Total Trade			Trade with United Kingdom			Trade with United States		
	1921	1922	1923	1921	1922	1923	1921	1922	1923
Imports for Consumption	$	$	$	$	$	$	$	$	$
Agricultural and Vegetable Products..	259,431,110	172,665,523	161,669,784	38,724,082	27,950,425	26,666,163	119,614,933	84,803,204	73,049,546
Animals and Animal Products.........	61,722,390	46,645,789	46,736,774	5,148,783	3,092,895	3,143,223	42,911,179	36,110,305	34,812,367
Fibres and Textile Products...........	243,608,342	139,997,137	170,146,958	111,348,051	50,892,567	69,339,824	101,738,045	67,619,469	77,285,998
Wood, Wood Products and Paper......	57,449,384	35,791,487	35,845,544	3,144,574	2,657,542	2,708,338	52,359,847	31,423,889	31,841,957
Iron and Its Products.................	245,625,703	110,210,539	138,724,455	16,698,085	8,985,903	12,671,433	226,855,725	99,938,235	124,371,885
Non-Ferrous Metal Products..........	55,651,319	29,773,413	37,492,604	6,682,748	2,523,868	3,595,638	45,959,914	25,343,095	31,791,237
Non-Metallic Mineral Products........	206,095,113	137,604,140	139,919,012	9,118,403	6,324,790	12,508,655	188,459,045	118,216,653	114,641,860
Chemicals and Allied Products........	37,887,449	24,630,333	25,793,101	6,046,972	3,237,117	3,636,013	28,128,104	18,143,315	18,347,545
Miscellaneous Commodities...........	72,688,072	50,485,971	46,136,811	17,061,864	11,470,236	7,018,384	50,150,028	34,360,031	34,775,037
Total Imports (mdse.).......	1,240,158,882	747,804,332	802,465,043	213,973,562	117,135,343	141,287,671	856,176,820	515,958,196	540,917,432
Dutiable Imports.	847,561,406	495,626,323	537,214,581	170,135,906	95,144,553	116,119,966	544,010,980	312,093,534	332,262,722
Free Imports.........................	392,597,476	252,178,009	265,250,462	43,837,656	21,990,790	25,167,705	312,165,840	203,864,662	208,654,710
Per Cent of Free Imports......	31·6	33·7	33·1	20·4	18·7	17·8	36·4	39·5	38·6
Exports (Canadian Produce)	$	$	$	$	$	$	$	$	$
Agricultural and Vegetable Products..	482,140,444	317,578,963	407,760,092	141,169,556	196,199,365	263,828,862	146,539,883	47,587,209	41,891,873
Animals and Animal Products.........	188,359,937	135,798,720	135,841,642	91,291,301	70,368,963	64,628,261	75,751,046	48,391,355	55,225,166
Fibres and Textile Products	18,783,884	4,585,987	7,850,843	2,643,202	1,020,612	1,077,976	7,122,882	1,996,634	4,432,767
Wood, Wood Products and Paper......	284,561,478	179,925,887	228,756,205	36,761,384	15,664,295	19,834,368	216,011,556	148,065,672	191,363,061
Iron and Its Products.................	76,500,741	28,312,272	51,137,912	17,653,826	4,758,888	11,556,627	19,630,413	4,693,020	9,409,265
Non-Ferrous Metal Products..........	45,939,377	27,885,996	44,358,037	9,873,516	5,997,576	8,107,032	30,029,799	14,687,260	27,889,699
Non-Metallic Mineral Products	40,121,892	22,616,684	27,646,704	3,127,338	3,253,427	728,674	22,270,447	12,605,032	20,817,688
Chemicals and Allied Products........	29,366,279	9,506,170	14,046,940	3,399,815	1,062,757	1,984,441	12,236,087	5,937,136	7,951,543
Miscellaneous Commodities...........	32,389,669	14,030,001	14,053,068	6,924,933	1,035,792	2,321,204	12,730,854	8,625,325	10,099,156
Total Exports (mdse.)........	1,189,163,701	740,240,680	931,451,443	312,844,871	299,361,675	379,067,445	542,322,967	292,588,643	369,080,218
Exports (Foreign Produce)									
Totals only...................	21,264,418	13,686,329	13,844,394	1,383,800	1,001,518	851,081	18,378,969	11,515,534	11,267,503

2.—Imports for Consumption and Exports of Canadian Produce, by Principal Countries, during the Fiscal Years ended March 31, 1920, 1921, 1922 and 1923

Countries	Imports for Consumption (Mdse.)				Exports of Canadian Produce (Mdse.)			
	1920	1921	1922	1923	1920	1921	1922	1923
British Empire	$	$	$	$	$	$	$	$
United Kingdom	26,362,631	213,973,562	117,135,343	141,287,671	489,152,637	312,844,871	299,361,675	379,067,445
Africa—British East	8,202	11,265	7,110	4,900	108,131	241,138	168,203	185,642
British South	735,948	146,798	127,738	185,107	8,649,756	14,648,879	3,890,390	5,583,390
British West	174,928	104,719	19,202	219,814	1,067,639	666,576	144,778	114,830
Bermuda	55,604	76,959	99,886	94,799	1,249,020	1,523,992	989,113	1,078,149
British East Indies—British India	7,785,254	6,766,751	5,279,857	8,140,221	4,818,053	4,196,350	1,637,145	2,027,317
Ceylon	3,168,132	2,351,117	2,187,329	2,981,239	201,616	344,167	94,480	246,752
Straits Settlements	5,269,180	5,185,611	1,454,742	1,252,107	1,742,554	1,843,744	608,294	574,273
Other	13,846	3,925	15,460	9,094	36	4,637	1,256	15,816
British Guiana	7,412,931	9,085,108	6,166,664	5,669,471	3,109,381	3,594,118	2,298,105	2,082,684
British Honduras	302,043	134,739	79,756	67,213	29,350	38,783	150,964	254,623
British West Indies—Barbados	7,532,265	8,314,996	2,994,559	4,117,016	2,131,195	2,537,087	1,377,984	1,272,173
Jamaica	2,631,833	4,418,062	2,215,531	4,233,195	3,280,535	3,380,991	2,214,164	2,805,012
Trinidad	966,719	628,896	1,678,658	2,111,302	3,746,644	4,949,376	4,548,535	3,439,091
Other	983,973	1,471,792	1,225,025	1,962,783	1,710,902	2,162,771	1,829,798	2,016,792
Egypt	10,271	391,326	68,563	16,095	227,652	914,718	494,575	756,934
Gibraltar	282	1,073	....	....	4,380,054	509,814	195,757	46,853
Hong Kong	3,208,836	3,516,760	2,109,737	1,878,869	1,343,867	2,000,825	1,411,699	1,943,808
Newfoundland	2,146,414	2,886,203	1,392,026	1,400,896	16,175,443	16,676,728	9,317,639	8,523,264
Oceania—Australia	1,371,775	791,980	1,079,324	1,457,921	11,415,623	18,112,861	10,678,600	18,783,766
Fiji	714,306	1,510,599	1,966,180	492,235	124,005	170,879	124,390	214,471
New Zealand	3,494,600	4,219,965	1,783,500	1,962,541	6,987,008	11,873,000	4,128,531	8,286,262
Other British Countries	1,686	10,482	23,063	13,096	140,786	215,914	169,335	306,545
Total, British Empire	174,351,659	266,002,688	149,109,253	179,557,585	561,791,887	403,452,219	345,835,410	439,625,892
Foreign Countries								
Argentine Republic	3,402,554	2,552,831	2,355,100	3,075,934	6,126,457	8,171,980	3,233,423	4,445,041
Austria-Hungary	49,723	96,164	....	....	33,168	129,536	....	....
Austria	....	....	34,637	167,820	....	....	29,541	7,478
Belgium	911,407	4,693,368	3,845,718	4,995,093	28,463,855	40,252,487	12,359,300	12,527,524
Brazil	1,973,768	2,151,066	1,495,245	1,391,136	2,703,488	2,835,191	2,002,449	1,929,067
Chile	240	97,579	20,471	230,066	890,960	864,309	290,678	313,850
China	1,205,229	1,897,349	1,413,527	1,460,696	6,665,805	4,906,570	1,900,627	5,125,967
Colombia	502,656	388,084	360,509	364,852	101,578	149,841	127,199	151,044
Costa Rica	119,989	18,454	60,333	44,104	33,547	59,993	95,347	89,288
Cuba	17,585,528	30,743,239	13,042,568	11,209,920	6,329,783	6,573,768	3,974,432	5,069,166
Czecho-Slovakia	2,238	98,187	351,924	694,447	387	3,693	26,046	79,018
Denmark	105,310	119,994	119,315	113,133	2,938,026	523,485	2,243,181	2,498,342
Finland	480	922	2,729	11,161	26,438	91,446	604,011	1,675,025

France	10,630,865	19,138,062	13,482,005	12,250,376	61,108,693	27,428,308	8,208,228	14,118,577
French Africa		2,240	11,573	137,110	362,637	1,312,859	535,696	95,529
St. Pierre and Miquelon	40,297	56,257	19,026	21,050	748,573	590,055	429,190	599,270
Germany	44,255	1,547,685	2,041,016	2,567,017	610,528	8,215,337	4,509,547	9,950,877
Greece	729,830	817,157	1,033,981	467,765	29,588,984	20,834,577	5,247,035	6,595,589
Guatemala	185,809	292,498	237,234	184,257	46,400	132,004	54,164	86,808
Honduras					43,660	173,115	143,422	143,904
Italy	999,040	1,745,330	1,387,370	1,598,477	16,959,557	57,758,343	15,335,818	12,073,332
Japan	13,637,287	11,360,821	8,194,681	7,211,015	7,732,514	6,414,920	14,831,520	14,510,133
Mexico	2,648,915	2,185,399	3,798,202	3,850,721	410,825	1,086,197	1,197,597	3,291,096
Netherlands	2,266,169	4,237,791	4,002,047	4,958,091	5,653,218	20,208,418	9,582,924	10,540,085
Dutch East Indies	3,709,400	993,764	833,101	1,734,990	1,492,775	2,426,087	951,569	654,859
Dutch Guiana	87,943			493	131,905	135,427	127,509	137,342
Nicaragua	12,457		188,363	14,041	30,093	75,130	15,478	31,043
Norway	461,848	616,978	426,928	560,042	4,798,299	5,119,365	3,913,372	2,216,756
Panama				7,945	409,291	450,202	178,770	224,501
Peru	5,072,408	4,171,912	6,983,403	4,711,644	273,967	614,472	71,683	415,917
Poland and Danzig		2,952	24,194	14,980	32,384	174,978	271,576	1,039,834
Portugal	312,912	517,222	222,506	124,028	197,385	1,476,894	87,664	384,848
Roumania		688	688	27,526	12,953,605	3,801,584	15,383	16,161
Russia	14,496	17,390	1,683	850	1,492,041	246,719	2,617,739	1,256,640
San Domingo	10,675,287	7,578,794	4,065,910	5,956,643	169,186	247,436	64,497	168,222
Spain	1,528,298	2,317,179	1,779,408	1,696,292	1,096,053	5,110,725	816,977	977,061
Sweden	360,353	555,927	245,295	485,522	4,449,105	5,528,361	1,220,196	2,574,262
Switzerland	7,758,051	14,143,448	8,671,608	7,735,538	1,484,416	1,410,777	345,626	519,196
Turkey	233,478	683,656	852,507	178,286	2,336,717	2,791,538	641,422	1,446,184
United States	801,097,318	856,176,820	515,958,196	540,917,432	464,028,183	542,322,967	292,588,643	369,080,218
Alaska	415,585	309,463	276,807	197,834	432,744	482,312	293,184	332,756
Hawaii	403,687	225,755	114,900	143,524	163,970	132,798	60,560	51,549
Philippines	47,014	229,907	189,264	128,183	292,547	511,741	170,821	346,156
Porto Rico	1,910	552	105	758	1,489,667	1,315,716	1,301,979	1,078,982
Uruguay	322,086	455,105	47,847	310,160	689,538	816,503	151,291	286,616
Venezuela	299,240	451,357	294,305	352,895	404,007	278,541	512,499	747,071
Other Foreign Countries	321,104	466,848	208,850	603,611	1,273,252	1,524,777	1,025,457	1,923,367
Total, Foreign Countries	890,176,464	974,156,194	598,695,079	622,907,458	677,700,211	785,711,482	394,405,270	491,825,551
Grand Total	1,064,528,123	1,240,158,882	747,804,332	802,465,043	1,239,492,098	1,189,163,701	740,240,680	931,451,443

3.—Imports into Canada for Consumption, by Principal Countries and Main Classes, Fiscal Year ended March 31, 1923

Countries from which Imported.	Vegetable Products (except Chemicals, Fibres and Wood.)	Animal Products (except Chemicals and Fibres.)	Fibres, Textiles and Textile Products.	Wood, Wood Products and Paper.	Iron and its Products.	Non-Ferrous Metals and their Products.	Non-Metallic Minerals and their Products (except Chemicals.)	Chemicals and Allied Products.	All Other Commodities.	Total Imports (mdse.)
	$	$	$	$	$	$	$	$	$	$
British Empire										
United Kingdom	26,666,163	2,143,223	69,339,824	2,708,338	12,671,433	3,595,638	12,508,655	3,636,013	7,018,384	141,287,671
Africa—British East	4,898								2	4,900
British South	94,773	9,917	74,532				3,701		2,184	185,107
British West	219,214								600	219,814
Bermuda	58,945	1,367	504	1,004	11,014				21,965	94,799
British East Indies—British India	3,937,544	193,028	3,967,483	5,043	496	3,986	6,119	16,404	10,118	8,140,221
Ceylon	2,977,374		2,392	20			187		1,266	2,981,239
Straits Settlements	1,092,291		1,581			151,355		5,112	1,768	1,252,107
Other	7,073						150	1,871		9,094
British Guiana	5,655,267			1,511	7,991	630			4,072	5,669,471
British Honduras	65,687			1,273					253	67,213
British West Indies—Barbados	4,112,755	35		112	2,850				1,264	4,117,016
Jamaica	4,200,054	14,087	141	429				1,936	16,548	4,233,195
Trinidad	2,097,166	1,064			11,283				1,789	2,111,302
Other	1,863,762	20,558	1,566	67	833	333	68,418		7,246	1,962,783
Egypt	15,710		237	10		12	20		106	16,095
Gibraltar										
Hong Kong	1,318,383	145,416	41,547	116,563	1,609	1,998	10,987	70,311	172,055	1,878,869
Newfoundland	8,207	838,122	2,364	14,319	337,958	1,549	76,837	135	121,405	1,400,896
Oceania—Australia	92,717	305,601	1,020,924	5,568			2,464	1,945	28,702	1,457,921
Fiji	488,739		915	2,485				1	95	492,235
New Zealand	44,318	1,337,644	559,280	3,755	1,351			61	16,132	1,962,541
Other British Countries	11,913		1,008						175	13,096
Total, British Empire	55,032,953	6,010,062	75,014,298	2,860,497	13,046,818	3,755,501	12,677,538	3,733,789	7,426,129	179,557,585
Foreign Countries										
Argentine Republic	59,352	2,779,545	132,636					92,863	11,538	3,075,934
Austria	6,459	60	4,313	215	2,962	131,938	5,192	22	16,659	167,820
Belgium	462,470	138,858	846,979	130,794	226,179	204,472	2,636,270	268,766	80,305	4,995,093
Brazil	1,375,616		12,507	400				7	2,606	1,391,136
Chile								230,066		230,066
China	680,800	259,758	413,446	16,008	232	4,735	15,140	10,068	60,509	1,460,696
Colombia	364,577								275	364,852
Costa Rica	42,816								1,288	44,104
Cuba	11,202,817	2,685		931	158			282	3,047	11,209,920
Czecho-Slovakia	11,592	8,533	161,502	32,737	8,317	25,744	200,973	3,879	241,170	694,447
Denmark	10,752	70,825	3,584	470	6,498	1,418	12,990	845	5,751	113,133
Finland	1,757	1,559		7,255	393				197	11,161

France	2,538,596	1,212,049	4,660,643	545,733	221,169	200,319	250,580	1,137,925	1,483,362	12,250,376
French Africa	530				136,538	37			5	137,110
St. Pierre and Miquelon	986	1,901	10	31	40		130	4	17,948	21,050
Germany	318,311	87,590	156,041	81,720	213,628	199,011	278,782	788,280	443,654	2,567,017
Greece	464,019	679	462					483	2,122	467,765
Guatemala	179,407	3,748							1,102	184,257
Honduras										
Italy	961,555	75,185	409,118	16,910	15,620	1,052	36,547	31,793	50,697	1,598,477
Japan	1,715,025	116,158	3,942,669	73,583	12,252	125,259	457,024	38,225	730,820	7,211,015
Mexico	223,546	330	293			9,670	3,547,612		69,270	3,850,721
Netherlands	1,875,226	130,589	236,933	14,467	45,759	374,428	1,245,476	688,393	346,820	4,958,091
Dutch East Indies	1,706,855	11,334	9,150	10					7,641	1,734,990
Dutch Guiana	411								82	493
Nicaragua	14,041									14,041
Norway	217	432,594	2,804	21,591	16,215	1,792	348	82,160	2,321	560,042
Panama									7,945	7,945
Peru	889,599						3,821,795		250	4,711,644
Poland and Danzig	3,850	5,435	3,577	2,034		30			54	14,980
Portugal	85,482	5,025	9,832	10,057			1,876		11,756	124,028
Roumania	27,424								102	27,526
Russia		310		33					507	850
San Domingo	5,956,643									5,956,643
Spain	1,352,516	1,761	53	116,127	78,497		75,384	19,278	52,676	1,696,292
Sweden	1,119	39,510	6,741	28,698	302,801	32,267	3,479	74,826	5,081	485,522
Switzerland	25,777	43,701	6,514,915	26,789	17,697	625,678	4,043	243,444	233,494	7,735,538
Turkey	98,411	407	77,971	33	317	879			268	178,286
United States	73,049,546	34,812,367	77,285,998	31,841,957	124,371,885	31,791,237	114,641,860	18,347,545	34,775,037	540,917,432
Alaska	1,605	170,783	706	12,669	480		318		11,273	197,834
Hawaii	138,376	2,160		2					2,986	143,524
Philippines	2,604		122,312	164		2	750		2,351	128,183
Porto Rico	752								6	758
Uruguay		306,924	3,236							310,160
Venezuela	341,555	190							11,150	352,895
Other Foreign Countries	443,839	13,159	114,229	3,629		7,135	4,905	158	16,557	603,611
Total, Foreign Countries	106,636,831	40,726,712	95,132,660	32,985,047	125,677,637	33,737,103	127,241,474	22,059,312	38,710,682	622,907,458
Grand Total Imports	161,669,784	46,736,774	170,146,958	35,845,544	138,724,455	37,492,604	139,919,012	25,793,101	46,136,811	802,465,043

1.—Exports of Canadian Produce from Canada, by Principal Countries and Main Classes, Fiscal Year ended March 31, 1923

Countries to which Exported	Vegetable Products (except Chemicals, Fibres and Wood)	Animal Products (except Chemicals and Fibres)	Fibres, Textiles and Textile Products	Wood, Wood Products and Paper	Iron and its Products	Non-Ferrous Metals and their Products	Non-Metallic Minerals and their Products (except Chemicals)	Chemicals and Allied Products	All Other Commodities	Total Canadian Exports (mdse.)
British Empire	$	$	$	$	$	$	$	$	$	$
United Kingdom	268,828,862	64,628,261	1,077,976	19,834,368	11,556,627	8,107,032	728,674	1,984,441	2,321,204	379,067,445
Africa—British East	64,391	22	265	6,671	105,328	....	....	8,760	205	185,642
British South	1,161,680	111,899	72,289	1,353,011	2,494,805	147,575	56,864	147,318	37,949	5,583,390
British West	46,287	1,919	....	193	58,094	....	1,295	6,492	550	114,830
Bermuda	593,679	241,577	12,619	82,031	11,027	4,818	60,444	23,785	48,169	1,078,149
British East Indies—British India	213,137	13,518	67	265,526	1,480,145	17,971	12,842	16,630	7,481	2,027,317
Ceylon	44,576	2,410	....	227	199,082	....	457	....	....	246,752
Straits Settlements	73,506	51,290	....	190,732	250,303	2,788	217	4,581	856	574,273
Other	5,435	....	....	....	10,381	....	....	....	....	15,816
British Guiana	1,460,661	307,146	21,651	98,416	50,708	3,455	70,049	29,644	40,954	2,082,684
British Honduras	168,636	53,595	5,641	5,557	2,109	188	8,698	2,878	7,321	254,623
British West Indies—Barbados	694,894	159,287	8,096	195,915	37,501	8,369	35,828	113,691	18,592	1,272,173
Jamaica	1,300,890	1,075,655	16,669	79,144	146,700	6,965	37,752	52,506	88,731	2,805,012
Trinidad	2,240,461	809,557	34,683	124,026	80,269	4,254	54,567	44,234	47,040	3,439,091
Other	1,547,201	226,010	10,697	101,253	44,682	1,426	10,680	36,513	38,330	2,016,792
Egypt	661,056	5,355	....	44,265	41,966	....	2,012	280	2,000	756,934
Gibraltar	2,021	....	....	....	1,358	....	43,474	....	....	46,853
Hong Kong	623,680	281,620	7,045	60,993	42,868	827,147	53,085	38,364	9,006	1,943,808
Newfoundland	4,394,977	876,217	263,991	222,419	363,385	42,806	1,757,592	448,933	152,944	8,523,264
Oceania—Australia	673,547	514,552	724,517	5,245,392	10,982,526	180,715	219,917	71,746	170,854	18,783,766
Fiji	16,323	59,670	2,129	104,312	17,610	273	11,884	2,050	220	214,471
New Zealand	1,006,915	467,265	560,918	1,823,432	3,801,364	269,883	124,091	109,114	123,280	8,286,262
Other British Countries	223,688	28,285	....	2,180	50,835	....	....	1,529	28	306,545
Total, British Empire	286,046,503	69,915,110	2,819,253	29,840,063	31,829,673	9,625,665	3,290,422	3,143,489	3,115,714	439,625,892
Foreign Countries										
Argentine Republic	783,297	462	115,572	621,142	2,825,960	21,227	36,192	27,019	14,170	4,445,041
Austria	741	....	....	25	5,982	730	....	....	....	7,478
Belgium	10,722,020	725,710	11,917	117,179	508,039	25,308	394,425	1,264	21,662	12,527,524
Brazil	353,326	672,791	5,033	4,048	633,808	201,117	38,067	2,610	18,267	1,929,067
Chile	35,653	18,029	940	26,781	74,879	88,574	1,834	67,142	18	313,850
China	2,452,301	399,680	20,858	545,339	285,617	1,294,670	30,416	45,066	52,020	5,125,967
Colombia	38,835	638	5,641	32,144	29,127	8,826	23,310	8,579	3,944	151,044
Costa Rica	18,726	38,573	....	9,784	13,787	39	1,233	6,044	1,102	89,288
Cuba	3,376,688	1,119,992	166	88,196	223,734	14,902	52,625	165,299	27,564	5,069,166
Czecho-Slovakia	44,603	....	31,710	300	855	....	200	....	1,350	79,018
Denmark	2,069,845	195,258	31,498	697	164,792	9,631	25,214	76	1,331	2,498,342
Finland	1,624,335	22,800	7,650	119	17,753	....	2,368	....	....	1,675,025

France	6,918,675	2,815,487	10,479	1,694,617	1,633,049	332,491	613,665	38,543	61,571	14,118,577
French Africa	71,031	855	1,140	11,303	10,072	......	1,128	......	......	95,529
St. Pierre and Miquelon	292,273	107,204	25,974	30,158	17,937	2,187	111,944	3,721	7,872	599,270
Germany	7,790,311	423,128	20,204	5,546	38,648	967,066	702,242	......	3,732	9,950,877
Greece	6,578,885	900	3,557	......	10,173	12	......	......	2,062	6,595,589
Guatemala	50,516	7,290	117	1,277	19,813	......	6,525	312	958	86,808
Honduras	109,643	120	......	1,632	2,452	......	21,367	6,409	2,281	143,904
Italy	11,118,997	707,061	27,981	3,237	8,802	30,509	169,034	......	7,711	12,073,332
Japan	4,407,914	1,160,728	78,691	3,865,763	395,296	3,700,120	368,690	520,291	12,640	14,510,133
Mexico	714,949	16,551	35,396	51,007	259,714	34,277	77,688	1,668,900	432,614	3,291,096
Netherlands	9,555,826	561,797	14,037	13,691	195,084	49,543	145,358	......	4,749	10,540,085
Dutch East Indies	192,578	7,475	953	475	434,016	......	7,743	11,619	......	654,859
Dutch Guiana	46,166	78,828	2,598	879	5,963	......	......	86	2,822	137,342
Nicaragua	8,625	455	3,274	108	......	......	......	18,581	......	31,043
Norway	1,969,584	77,658	22,311	1,027	115,153	15,180	14,583	......	1,260	2,216,756
Panama	106,051	91,107	......	6,644	7,937	......	7,146	5,269	347	224,501
Peru	228,605	8,306	10,905	97,284	13,916	754	22,877	29,890	3,380	415,917
Poland and Danzig	1,031,444	3,000	100	......	1,018	......	......	......	4,272	1,039,834
Portugal	347,037	298	522	......	36,991	......	......	......	......	384,848
Roumania	6,060	......	17	......	8,979	......	......	955	150	16,161
Russia	914,022	120,959	45,924	7,084	64,788	1,916	11,431	4,589	85,927	1,256,640
San Domingo	97,243	11,785	......	4,855	20,357	193	16,429	9,870	7,490	168,222
Spain	150,032	1,515	9,299	2,826	723,921	26,729	15,925	45,442	1,372	977,061
Sweden	1,833,606	244,785	31,501	280	456,144	......	7,664	......	282	2,574,262
Switzerland	370,784	58,854	328	5,107	61,428	6,807	10,021	......	5,867	519,196
Turkey	1,406,828	......	......	......	37,856	1,500	......	......	......	1,446,184
United States	41,891,873	55,225,166	4,432,767	191,363,061	9,409,265	27,889,699	20,817,688	7,951,543	10,099,156	369,080,218
Alaska	16,804	9,613	254	4,102	1,952	38	290,407	2,906	6,680	332,756
Hawaii	......	208	80	27,588	40	......	22,467	......	1,166	51,549
Philippines	98,293	9,077	100	27,480	2,517	121	207,841	347	380	346,156
Porto Rico	3,518	939,771	198	49,754	1,474	920	63,518	9,484	10,345	1,078,982
Uruguay	76,982	86	2,487	53,317	149,472	46	80	3,889	257	286,616
Venezuela	647,729	......	12,852	6,042	56,259	1,948	1,333	19,354	1,554	747,071
Other Foreign Countries	1,140,335	42,532	6,559	134,244	323,420	5,292	15,604	228,352	27,029	1,923,367
Total, Foreign Countries	121,713,589	65,926,532	5,031,590	198,916,142	19,308,239	34,732,372	24,356,282	10,903,451	10,937,354	491,825,551
Grand Total Exports	407,760,092	135,841,642	7,850,843	228,756,205	51,137,912	44,358,037	27,646,704	14,046,940	14,053,068	931,451,443

5.—Principal Imports into Canada for Consumption, Fiscal Years 1921, 1922 and 1923, also Imports from the United Kingdom and the United States, 1922 and 1923

Classification	Total Imports for Consumption (Merchandise)			Imports from United Kingdom		Imports from United States	
	1921	1922	1923	1922	1923	1922	1923
Vegetable Products							
A. Mainly Food—							
Fruits—							
Fresh—							
Apples.............. Brl.	273,319	110,702	155,201	....	....	110,702	155,201
$	1,528,606	680,832	775,819	....	....	680,832	775,819
Bananas.......... Bunch	1,706,288	2,159,860	2,219,814	....	....	2,159,381	2,213,379
$	5,415,511	5,211,098	4,215,766	....	....	5,210,811	4,205,719
Grapes.............. Lb.	6,632,035	7,669,621	7,698,005	608,080	704,456	6,917,481	6,836,059
$	858,340	831,522	661,443	109,960	75,275	695,235	565,377
Lemons and limes... $	1,005,616	1,446,444	1,474,673	4,290	57,413	1,158,298	885,288
Oranges and grape fruit............... $	7,114,269	7,306,100	6,689,996	8,414	111,611	6,991,406	6,191,163
Peaches............ Lb.	6,195,404	10,928,049	10,866,101	540	216	10,927,509	10,865,780
$	442,265	583,450	403,312	219	88	583,231	403,198
Other.............. $	3,036,873	2,814,227	3,134,042	2,147	2,045	2,802,269	3,088,596
Dried—							
Currants............ Lb.	4,934,917	7,195,245	5,193,976	219,697	45,599	983,008	1,641,136
$	849,893	1,117,955	634,465	29,670	4,331	126,100	199,748
Prunes and plums... Lb.	10,494,520	13,705,795	13,993,275	....	48	13,702,978	13,806,997
$	1,459,102	1,278,539	1,335,200	....	16	1,277,912	1,324,294
Raisins.............. Lb.	24,979,194	27,666,692	32,044,480	99,109	105,496	24,177,923	30,646,915
$	5,482,589	5,132,755	3,644,419	16,126	10,077	4,242,809	3,426,146
Other............... $	1,478,657	1,622,007	1,537,995	97,737	84,444	1,314,573	1,331,813
Otherwise Prepared—							
Canned............. Lb.	19,383,538	8,096,222	12,480,511	64,118	84,217	6,261,354	9,535,186
$	2,795,447	970,183	1,257,531	8,160	5,998	765,108	993,702
Other............... $	663,854	342,561	471,156	122,554	238,079	107,840	96,591
Fruit juices and syrups Gal.	109,252	77,768	98,682	16,812	8,915	28,072	40,147
$	185,754	170,404	173,418	17,677	19,608	131,390	135,315
Total Fruits......... $	32,316,776	29,508,077	26,409,235	416,954	608,985	26,087,814	23,622,769
Nuts.................... $	4,889,294	4,534,284	3,728,475	136,288	137,591	1,896,386	1,431,994
Vegetables—							
Potatoes (except sweet)..............Bush.	955,297	429,543	350,839	....	....	429,526	349,667
$	1,696,205	501,645	451,480	....	....	501,628	450,006
Tomatoes, fresh......Bush.	188,822	315,713	397,189	....	....	315,388	395,183
$	550,714	907,717	965,941	....	....	906,566	959,578
Other fresh............ $	2,189,920	2,122,186	2,157,649	142,644	112,815	1,754,012	1,807,800
Other (dried).......... $	7,217	7,943	4,712	28	132	5,732	4,545
Canned................ Lb.	8,293,193	6,407,327	7,890,537	4,375	1,276	3,747,153	5,596,032
$	1,124,041	889,913	806,286	958	298	371,480	474,659
Sauces and pickles..... Gal.	299,827	299,311	339,986	114,087	142,565	59,911	81,205
$	500,148	460,447	518,666	252,389	310,161	98,706	128,751
Total Vegetables.... $	6,068,245	4,889,851	4,904,734	396,019	423,406	3,638,124	3,825,339
Grains and Farinaceous Products—							
Grains—							
Beans..............Bush.	203,725	148,157	329,974	5,002	68,804	60,726	32,140
$	637,632	376,792	777,214	20,614	150,817	197,876	97,045
Corn...............Bush.	9,977,764	14,120,988	11,000,321	26	5	14,120,962	10,974,962
$	12,621,410	8,713,345	7,795,320	68	8	8,713,277	7,773,081
Oats...............Bush.	939,955	119,334	1,063,336	1,266	581	118,065	1,062,656
$	661,030	71,993	413,406	1,835	597	70,157	412,732
Rice............... Lb.	50,589,318	58,487,282	54,985,567	203,740	989,495	25,831,498	19,648,824
$	3,781,088	2,371,199	2,020,596	10,049	40,494	1,096,647	849,614
Other............... $	572,775	652,990	269,146	197	4,776	632,696	215,174
Milled products....... $	847,761	664,469	685,895	43,371	38,696	600,133	617,819
Prepared foods and bakery products.... $	1,105,679	929,096	821,839	137,198	134,024	753,895	655,618
Other grains and farinaceous products...... $	785,711	594,831	640,017	10,641	20,796	441,571	478,011
Total Grains and Farinaceous Products............. $	21,013,086	14,374,715	13,423,433	223,973	390,208	12,506,252	11,099,094
Oils, Vegetable, for Food—							
Cocoanut oil, n.o.p..... Gal.	126,526	63,585	85,658	9,362	11,122	54,017	72,456
$	266,867	93,040	87,894	14,190	13,700	78,572	72,343
Cotton seed oil for canning fish............ Gal.	61,973	43,933	49,158	....	....	43,933	49,158
$	95,567	45,037	53,595	....	....	45,037	53,595
Cotton seed oil, n.o.p.. Gal.	168,038	70,040	53,736	388	1,443	69,639	52,280
$	223,543	57,487	57,912	849	1,661	56,623	56,236
Olive oil, n.o.p........ Gal.	125,966	180,827	186,106	4,004	3,021	82,170	51,958
$	498,447	488,381	357,921	13,601	7,727	217,255	100,257

5.—Principal Imports into Canada for Consumption, etc.—*Continued*

Classification		Total Imports for Consumption (Merchandise)			Imports from United Kingdom		Imports from United States	
		1921	1922	1923	1922	1923	1922	1923
Vegetable Products								
A. Mainly Food—*Con.*								
Palm oil and shea butter	Lb.	112,431	23,745	60,287	11,230	2,838	12,515	57,449
	$	21,266	3,566	5,386	1,186	276	2,380	5,110
Peanut and soya bean oil, n.o.p.	Gal.	120,360	103,209	199,867	1,900	3,952	67,253	102,476
	$	167,799	76,233	147,627	1,500	3,706	33,477	63,293
Total Oils, Vegetable, for Food	$	1,273,489	763,744	710,335	31,326	27,070	433,344	350,834
Sugar and Its Products—								
Molasses, 56 degrees or less, imported under Preferential tariff	Gal.	5,520,876	3,127,954	5,034,946	....	....	....	....
	$	6,238,144	1,555,373	2,319,916	....	....	....	....
Sugar, not above No. 16 D.S.	Lb.	695,188,623	864,424,723	1,143,455,567	....	162	153,514,410	119,414,235
	$	76,556,225	39,945,653	36,061,071	....	84	7,643,796	3,400,636
Other	$	3,275,861	2,939,885	1,230,869	461,590	438,632	2,016,532	621,899
Tea, Coffee, Cocoa and Spices—								
Cocoa—								
Cocoa beans, not roasted, crushed, etc.	Cwt.	116,269	163,978	160,856	29,301	24,751	71,541	47,131
	$	1,717,316	1,557,382	1,617,986	286,839	223,340	687,282	521,536
Cocoa butter	Lb.	3,257,725	5,124,467	4,438,882	869,111	188,305	3,688,213	2,562,567
	$	1,105,314	1,430,214	1,254,535	268,304	52,406	999,839	755,340
Other	$	554,031	205,301	116,481	96,064	13,735	91,992	88,444
Coffee and Chicory—								
Coffee, green	Lb.	17,066,156	21,080,366	20,970,557	971,438	547,541	996,455	489,031
	$	3,961,778	3,176,314	3,296,138	185,848	110,206	151,285	81,923
Other coffee and chicory	$	322,722	315,497	287,871	11,489	17,840	301,374	267,956
Spices	$	1,275,076	1,219,832	1,180,265	520,088	517,658	433,125	407,537
Tea	Lb.	33,422,902	38,844,703	40,274,205	12,390,354	9,440,856	275,189	450,706
	$	9,668,785	9,132,093	10,356,757	3,632,505	2,833,134	55,727	78,170
Yeast	Lb.	1,577,564	1,764,108	1,895,707	....	....	1,764,055	1,895,530
	$	465,453	578,540	568,429	....	....	578,487	568,374
Other Vegetable Products, mainly Food—								
Hops	Lb.	1,681,822	2,141,702	3,380,265	45,951	66,145	2,055,543	3,121,909
	$	1,000,711	778,958	697,814	39,940	47,542	688,153	605,406
All other vegetable products, mainly food	$	239,541	440,317	537,418	47,385	60,342	268,399	401,722
Total Vegetable Products—A. Mainly Food	$	171,941,847	117,346,030	108,701,762	6,754,612	5,902,179	58,477,911	48,128,973
Vegetable Products								
B. Other than Food—								
Beverages—								
Brewed	Gal.	74,105	49,160	54,241	42,306	51,653	6,065	1,635
	$	143,737	114,810	120,362	103,051	116,808	10,683	2,425
Distilled	Gal.	3,554,214	1,368,297	1,210,413	941,419	902,580	65,737	28,045
	$	32,224,707	23,224,714	19,743,448	18,865,590	17,335,936	1,129,611	438,914
Fermented	$	2,277,763	1,184,678	1,071,488	135,109	94,401	20,691	11,349
Total Beverages	$	34,646,207	24,524,202	20,935,298	19,103,750	17,547,145	1,160,985	452,688
Gums and Resins—								
Chicle gum, crude	Lb.	514,910	492,086	668,153	....	....	344,713	527,669
	$	265,902	238,483	332,183	....	....	171,511	260,757
Resin or rosin	Cwt.	268,333	241,651	271,489	1	....	237,304	270,625
	$	1,464,778	493,048	558,907	6	....	479,480	556,478
Other	$	1,930,053	1,226,864	1,557,302	46,485	75,191	1,039,848	1,346,741
Total Gums and Resins	$	3,660,733	1,958,395	2,448,392	46,491	75,191	1,690,839	2,163,976
Oilcake	Cwt.	187,862	106,113	47,222	500	545	104,609	38,955
	$	501,165	229,095	103,231	1,650	1,063	225,369	88,991
Oils—Vegetable, not Food—								
Cocoanut, palm, etc., not edible peanut, etc., for mfr. of soap	Gal.	1,103,672	1,342,390	1,928,336	45,772	62,235	1,285,171	1,819,474
	$	1,477,090	1,008,897	1,300,405	41,996	52,352	954,222	1,215,860
Cotton seed, crude, for refining	Gal.	4,173,007	4,886,834	2,583,807	....	....	4,886,834	2,583,807
	$	3,944,645	3,283,915	2,239,174	....	....	3,283,915	2,239,174

5.—Principal Imports into Canada for Consumption, etc.—*Continued*

Classification	Total Imports for Consumption (Merchandise)			Imports from United Kingdom		Imports from United States	
	1921	1922	1923	1922	1923	1922	1923
Vegetable Products.—							
B. Other Than Food—*Con.*							
Oils-Vegetable, not Food—*Con.*							
Essential (except peppermint)............ Lb.	285,400	346,027	413,665	30,723	47,490	274,868	318,691
$	874,628	556,703	620,223	70,042	79,196	395,128	435,780
Flaxseed or linseed.... Lb.	5,955,926	416,231	1,173,454	239,887	930,294	103,372	158,401
$	1,425,452	34,543	103,595	16,779	76,570	10,241	19,404
Other .... $	1,333,285	670,122	1,086,153	110,030	132,324	545,399	733,940
Total Oils Vegetable, not Food............ $	9,055,100	5,554,180	5,349,550	238,847	340,442	5,188,905	4,664,158
Plants, trees, shrubs and vines............... $	993,045	934,242	1,064,311	23,621	24,162	339,976	411,451
Rubber—							
Raw.................. Lb.	22,806,180	18,952,465	25,395,735	820,963	4,107,154	13,264,904	14,541,151
$	8,887,196	3,437,716	5,623,980	133,461	873,671	2,261,452	3,395,262
Recovered............ Lb.	2,523,590	1,226,904	1,983,593	....	....	1,226,904	1,983,593
$	433,456	139,494	178,770	....	....	139,494	178,770
Tires.................. $	2,310,941	1,188,981	1,322,050	16,254	21,493	1,157,261	1,296,592
Other.................. $	3,849,367	2,376,067	2,792,037	678,340	787,496	1,668,543	1,967,904
Total Rubber....... $	15,480,960	7,142,258	9,916,837	828,055	1,682,660	5,226,750	6,838,528
Seeds—							
Clover................ Lb.	2,598,380	3,547,080	2,248,010	481,640	335,363	3,063,040	1,912,102
$	560,247	715,209	459,639	100,620	87,260	613,458	372,139
Timothy.............. Lb.	9,281,201	12,852,483	13,469,226	1,090	75	12,851,393	13,469,151
$	814,023	926,350	975,880	547	23	925,803	975,857
Other.................. $	3,358,231	1,294,776	1,092,592	163,852	95,375	537,771	669,065
Total Seeds......... $	4,732,501	2,936,335	2,528,111	265,019	182,658	2,077,032	2,017,061
Tobacco—							
Unmanufactured...... Lb.	20,007,411	20,870,509	14,548,694	17,762	14,857	19,848,439	13,063,379
$	13,082,293	8,867,469	5,854,405	7,640	4,944	8,108,639	4,686,642
Manufactured......... $	1,273,001	1,080,434	1,235,056	656,547	861,340	291,234	227,493
Other Vegetable Products not Food—							
Broom corn........... $	511,222	327,114	685,819	....	....	327,114	685,819
Hay.................. Ton	50,789	28,999	37,040	....	....	28,998	36,994
$	1,300,892	464,490	616,148	....	....	464,458	614,761
Starch, including farina, corn starch, etc...... $	251,003	130,260	170,982	8,674	10,675	105,379	121,713
Turpentine, spirits of.. Gal.	791,331	977,871	975,810	4	3	977,867	975,807
$	1,131,224	757,953	1,210,114	12	4	757,941	1,210,109
Other vegetable products, not food...... $	868,917	413,066	849,768	15,507	33,700	360,672	737,183
Total Vegetable Products.—B.—Other than food.......... $	87,489,263	55,319,493	52,968,022	21,195,813	20,763,984	26,325,293	24,920,573
Total Vegetable Products (A. and B.). $	259,431,110	172,665,523	161,669,784	27,950,425	26,666,163	84,803,204	73,049,546
Animals and Their Products—							
Animals—							
For exhibition........ $	1,331,664	1,565,864	1,722,107	2,925	....	1,562,939	1,722,107
For improvement of stock................ $	1,089,641	452,255	326,187	90,462	62,860	349,424	263,063
Other.................. $	650,686	485,896	318,571	19,737	6,205	463,450	306,852
Bone, ivory and shell products.............. $	1,012,695	305,963	431,613	62,693	116,090	186,981	220,633
Feathers and quills...... $	533,552	307,511	242,305	45,524	24,202	219,190	181,707
Fishery products, n.o.p.—							
Fresh.................. $	1,030,348	875,991	928,714	3,054	3,163	556,410	644,472
Canned................ $	1,075,192	1,028,248	856,683	64,747	61,737	469,164	233,723
Dried, salted, smoked, preserved, n.o.p..... $	1,622,469	1,009,160	877,612	80,627	63,367	67,084	92,852
Other fishery products $	219,599	157,635	150,098	8,261	5,527	117,819	114,564
Total Fishery Products, n.o.p........ $	3,947,608	3,071,034	2,813,107	156,689	133,794	1,210,477	1,085,611
Furs and Fur Skins—							
Unmanufactured—							
Undressed.......... $	4,626,332	6,501,045	5,763,534	63,597	231,926	6,220,946	5,093,701
Other............... $	1,811,851	1,517,195	1,371,211	69,661	63,187	710,631	630,483
Manufactured......... $	148,342	136,277	111,179	36,037	27,852	93,878	82,311
Total Furs and Fur Skins.............. $	6,586,525	8,154,517	7,245,924	169,295	322,965	7,025,455	5,806,495
Hides and skins......... $	10,652,787	5,898,087	7,947,410	75,402	149,770	3,405,013	3,747,703

5.—Principal Imports into Canada for Consumption, etc.—*Continued*

Classification	Total Imports for Consumption (Merchandise)			Imports from United Kingdom		Imports from United States	
	1921	1922	1923	1922	1923	1922	1923
Animals and their Products—*Con.*							
Leather—							
Unmanufactured...... $	6,356,952	4,188,038	3,822,586	505,232	711,093	3,615,452	3,082,660
Manufactured—							
Boots and shoes..... $	2,200,121	1,338,775	1,220,734	338,628	414,564	985,775	797,444
Other............... $	1,987,931	1,348,769	1,424,197	295,209	312,989	717,381	905,506
Total Leather....... $	10,545,004	6,875,582	6,467,517	1,139,069	1,438,646	5,318,608	4,785,610
Hair and bristles........ $	959,921	532,228	607,236	65,971	132,289	339,841	431,908
Meats—							
Beef, fresh............ Lb.	1,632,862	73,512	115,064	....	....	72,808	115,064
$	299,542	20,085	33,943	....	....	20,051	33,943
Mutton, fresh.......... Lb.	7,847,701	3,416,332	1,460,130	....	....	2,630,357	1,147,018
$	1,272,165	533,005	261,382	....	....	420,794	226,384
Pork, fresh............ Lb.	22,402,444	28,600,126	33,098,701	3,585	....	28,595,181	33,098,670
$	3,862,311	4,443,933	5,134,061	611	....	4,443,123	5,134,045
Other, fresh........... $	337,853	105,582	93,531	2,055	12,085	97,825	79,603
Bacon and hams....... Lb.	6,823,423	6,902,688	4,664,217	1,200	2,803	6,901,466	4,661,262
$	1,548,084	1,242,918	673,035	496	1,242	1,242,414	671,754
Pork, barrelled in brine............... Lb.	10,849,632	8,309,465	12,406,300	400	....	8,307,120	12,405,500
$	1,735,124	826,004	1,357,659	75	....	825,569	1,357,546
Other .... $	2,373,404	1,831,084	1,794,090	300,085	197,632	1,345,753	1,482,532
Total Meats......... $	11,428,483	9,002,611	9,347,701	303,322	210,959	8,395,529	8,985,807
Milk and its Products—							
Butter................ Lb.	3,741,628	6,078,882	3,767,573	2,149,704	280,982	1,363,021	1,523,381
$	1,805,709	1,883,013	1,349,819	621,779	109,613	458,306	578,775
Other................. $	449,852	405,260	494,393	24,995	45,335	284,461	271,321
Oils, Fats, Greases and Wax—							
Grease, rough, for mfr. of soap and oils...... Lb.	14,310,759	16,524,853	13,435,359	18,086	26,486	16,442,645	13,345,853
$	1,532,550	1,049,222	938,123	1,332	1,092	1,044,309	934,799
Lard.................. Lb.	11,493,226	9,091,245	10,551,616	56	....	9,091,109	10,551,570
$	1,902,768	948,087	1,144,141	11	....	948,068	1,144,120
Lard compound....... Lb.	3,245,408	3,088,479	2,516,071	310,416	198,811	2,778,063	2,316,924
$	467,392	292,980	243,748	39,570	22,134	253,410	221,582
Oleomargarine........ Lb.	4,630,747	1,345,784	1,165,440	6,000	....	1,339,784	1,165,440
$	1,206,351	257,393	190,782	1,399	....	255,994	190,782
Other................. $	877,235	379,678	459,131	17,403	27,483	303,338	352,546
Total Oils, Fats, etc. $	5,986,296	2,927,360	2,975,925	59,715	50,709	2,805,119	2,843,829
Other animal products—							
Eggs..................Doz.	5,341,936	9,637,303	8,319,622	6	80	9,377,769	8,256,168
$	2,344,297	3,239,480	2,508,504	39	137	3,162,143	2,494,650
Gelatine.............. Lb.	1,103,800	749,007	787,649	267,679	365,708	230,224	207,526
$	756,568	461,693	348,391	119,922	108,404	222,013	160,492
Glue.................. $	701,877	294,792	363,054	102,247	196,044	158,189	126,700
Other................. $	939,225	782,643	1,227,010	33,109	35,201	543,167	799,104
Total Animals and Their Products.... $	61,722,390	46,645,789	46,736,774	3,092,895	3,143,223	36,110,305	34,812,367
Fibres and Textiles—							
Cotton—							
Raw.................. Lb.	98,631,504	95,385,978	125,261,470	276,971	40,708	94,961,143	125,159,943
$	28,541,989	16,321,317	28,324,704	69,145	2,183	16,207,537	28,318,681
Yarns, thread and cordage............ $	10,803,377	4,444,280	5,062,876	1,854,605	2,126,835	2,509,093	2,825,024
Fabrics—							
Damask of cotton, table cloths, etc.. $	1,179,604	613,700	608,056	428,842	398,388	80,021	89,579
Duck over 8 oz. per sq. yd............ Yd.	2,318,161	1,336,862	1,973,256	148,800	237,336	1,188,062	1,735,543
$	3,958,944	1,274,299	1,620,451	107,405	266,378	1,166,894	1,353,719
Printed, dyed or coloured........... Yd.	52,530,220	52,509,492	58,495,746	18,423,924	29,558,845	32,881,666	27,458,611
$	21,052,640	12,096,748	13,511,968	4,988,618	7,271,227	6,462,262	5,600,134
Grey, unbleached... Yd.	11,500,490	6,908,551	13,487,895	2,065,217	4,524,104	4,842,707	8,952,413
$	2,948,302	1,109,992	1,493,445	537,548	475,864	572,222	1,011,971
Towelling in the web Yd.	4,811,103	2,412,547	3,249,705	1,902,178	2,900,808	508,409	347,453
$	1,129,157	323,390	410,035	274,797	373,593	48,389	36,340
Velvets and plush... Yd.	1,654,960	984,051	1,377,875	525,633	742,909	412,393	418,603
$	1,559,783	852,100	1,012,980	377,218	462,700	419,054	356,470
White or bleached... Yd.	14,355,543	9,583,472	11,143,215	2,777,483	3,390,570	6,455,917	7,352,507
$	4,167,055	1,673,863	1,922,705	612,301	689,686	954,400	1,113,354

5.—Principal Imports into Canada for Consumption, etc.—*Continued*

Classification	Total Imports for Consumption (Merchandise)			Imports from United Kingdom		Imports from United States	
	1921	1922	1923	1922	1923	1922	1923
Fibres and Textiles—*Con.*							
Cotton—*Con.*							
Fabrics—*Con.*							
Handkerchiefs...... $	1,763,255	929,956	1,007,926	646,303	736,474	51,740	36,999
Towels.............. $	1,604,804	745,055	875,664	415,636	514,509	326,065	356,801
Other............... $	7,311,409	3,131,133	3,749,699	1,304,714	1,911,208	1,773,771	1,776,004
Embroideries.......... $	1,553,090	760,677	663,103	84,907	57,629	95,275	64,981
Lace.................. $	4,632,876	3,310,999	3,300,685	1,554,679	1,793,027	768,986	728,685
Wearing Apparel—							
Socks and stockings..........Doz. pr.	361,970	398,909	585,712	24,026	20,319	367,498	544,538
$	1,053,727	715,942	1,056,816	92,462	72,743	614,010	962,020
Other............... $	3,856,112	2,834,828	2,646,236	466,025	496,988	2,139,184	1,933,039
Other manufactures of cotton............... $	2,700,470	1,339,549	1,452,923	201,552	227,743	1,062,549	1,146,710
Total Cotton........ $	99,816,594	52,477,828	68,720,272	14,016,757	17,877,175	35,251,452	47,710,511
Flax, Hemp and Jute—							
Hemp, dressed or undressed.............Cwt.	47,090	77,833	203,844	4	2,361	72,978	196,956
$	456,646	588,049	1,418,072	87	19,766	550,812	1,370,147
Jute or hemp yarn, for weaving............ Lb.	4,950,637	2,638,368	4,497,210	1,512,288	3,559,150	1,030,876	767,823
$	1,331,563	326,407	513,550	145,607	364,206	142,924	114,656
Linen fabrics.......... $	4,357,934	2,381,289	3,123,210	1,959,111	2,571,879	264,783	339,239
Jute cloth or canvas... Yd.	63,406,570	69,988,232	84,154,081	6,934,018	13,439,115	21,684,881	9,319,538
$	7,005,189	4,017,461	5,944,247	817,614	1,474,408	1,137,684	667,596
Other flax, hemp and jute................. $	1,774,787	748,161	943,889	540,343	694,739	180,235	193,800
Total Flax, Hemp and Jute.......... $	14,926,119	8,061,367	11,942,968	3,462,762	5,124,998	2,276,438	2,685,438
Silk—							
Raw or as reeled from cocoon.............. Lb.	272,508	371,570	368,026	....	....	353,645	367,758
$	2,206,518	2,529,920	2,733,599	....	....	2,429,686	2,731,479
Other unmanufactured $	414,550	131,713	191,020	34,754	59,200	77,585	117,314
Fabrics—							
For neckties......... $	1,428,172	753,562	636,094	49,758	28,043	288,189	282,071
Ribbons............ $	3,882,360	1,881,919	1,575,726	168,534	177,502	692,359	512,204
Velvets and plush... Yd.	772,678	514,646	888,626	228,766	418,917	153,488	164,339
$	1,619,312	767,760	1,349,697	306,599	611,503	253,716	347,445
Other............... $	17,037,697	13,423,076	12,109,886	906,162	995,258	2,896,543	2,836,265
Wearing apparel....... $	2,219,108	2,064,922	2,213,159	211,441	222,927	1,475,389	1,613,738
Other silk and manufactures of.......... $	913,075	389,466	346,695	146,557	135,959	161,945	154,606
Total Silk.......... $	29,720,792	21,942,338	21,155,876	1,823,796	2,230,392	8,275,412	8,595,122
Wool—							
Raw.................. Lb.	9,285,663	12,661,812	18,273,344	5,373,720	8,913,109	2,578,414	3,225,871
$	5,088,665	3,179,076	5,078,929	1,591,771	2,733,725	606,960	773,653
Noils, waste and tops. $	6,673,288	3,357,699	4,525,784	2,715,052	3,638,230	210,857	222,684
Yarns................. Lb.	3,286,940	2,093,516	3,401,211	2,030,438	3,148,700	43,601	164,392
$	7,523,406	2,493,031	4,237,874	2,376,311	3,958,716	69,075	137,340
Carpets............... $	2,597,408	1,559,610	1,525,623	1,106,830	1,080,404	259,147	191,188
Fabrics—							
Lustres, mohairs, alpaca, etc.......... Yd.	1,800,424	1,949,745	2,640,376	1,936,077	2,630,955	11,668	6,358
$	1,681,195	1,208,155	1,456,062	1,191,072	1,447,793	15,136	6,279
Tweeds............ Yd.	2,585,883	1,925,303	3,568,098	1,706,666	3,479,248	191,246	73,536
$	5,378,147	2,448,274	3,551,511	2,072,431	3,414,791	329,751	115,443
Women's dress goods...........Sq. yd.	4,921,659	3,917,642	5,132,410	3,783,880	4,839,382	1,600	315
$	5,808,510	1,834,304	2,157,075	1,719,411	1,938,349	819	303
Worsteds, serges, coatings, etc...... Yd.	6,453,434	6,053,591	7,763,661	5,297,056	7,344,721	566,657	205,117
$	17,097,360	10,329,758	11,630,159	9,001,126	11,007,787	1,032,920	356,959
Other............... $	1,679,182	720,341	1,233,141	612,843	1,141,678	67,581	56,696
Wearing Apparel—							
Socks and stockings Doz. pr.	354,965	286,167	606,867	274,810	593,639	11,236	12,928
$	2,864,938	1,371,731	2,786,031	1,329,983	2,737,424	40,436	46,114
Women's and children's outside garments............ $	1,586,551	1,569,205	1,145,193	234,284	235,087	1,310,254	888,754
Other............... $	3,585,566	2,023,455	2,603,968	1,507,761	2,113,055	491,874	462,909
Miscellaneous wool $	5,453,424	3,133,052	3,803,031	1,774,070	2,315,644	948,457	779,850
Total Wool.......... $	67,017,640	35,227,691	45,734,381	27,232,945	37,762,683	5,383,267	4,038,172

5.—Principal Imports into Canada for Consumption, etc.—*Continued*

Classification	Total Imports for Consumption (Merchandise)			Imports from United Kingdom		Imports from United States	
	1921	1922	1923	1922	1923	1922	1923
Fibres and Textiles—*Con.*							
Other Fibres and their Products, n.o.p.—							
Binder twine.......... Lb.	34,755,071	46,758,792	49,990,387	106,660	3,062,720	46,651,936	46,927,667
$	5,480,897	7,368,892	5,200,022	17,842	379,453	7,351,011	4,820,569
Manila and sisal grass. Cwt.	453,754	187,521	216,818	18,032	29,949	147,944	172,378
$	4,576,533	1,368,039	1,497,148	182,503	226,975	1,039,837	1,179,025
Other fibres and their products............ $	649,516	385,588	339,952	25,132	43,306	258,739	174,131
Total Other Fibres and Their Products, n.o.p.............. $	10,706,946	9,122,519	7,037,122	225,477	649,734	8,649,587	6,173,725
Mixed Textile Products—							
Fish lines and nets..... $	2,693,537	1,551,733	2,040,753	763,501	948,562	746,856	1,061,342
Cordage, n.o.p., and manufactures of..... $	826,476	321,583	437,860	197,548	275,476	111,345	152,329
Yarn of artificial silk.. Lb.	512,109	570,450	933,791	285,778	469,201	186,122	178,446
$	2,037,142	1,347,871	2,248,997	695,173	1,159,837	435,251	427,595
Oilcloth, etc.........Sq. yd.	1,416,836	802,210	862,494	355,551	451,444	446,659	410,883
$	1,355,419	671,362	640,421	398,551	411,716	272,811	228,546
Wearing Apparel—							
Braids of straw, etc., for hats........... $	1,258,935	560,070	479,607	45,545	46,192	283,288	229,189
Hats, caps and bonnets of all kinds... $	4,056,429	2,972,900	3,116,227	806,336	916,531	1,957,616	1,896,917
Hat materials, n.o.p. $	1,336,677	1,084,658	850,324	56,422	48,337	786,628	704,928
All other mixed textile products....... $	7,855,636	4,655,217	5,742,150	1,167,754	1,888,191	3,189,518	3,382,184
Total Mixed Textile Products.......... $	21,420,251	13,165,394	15,556,339	4,130,830	5,694,842	7,783,313	8,083,030
Total Fibres and Textiles........... $	243,608,342	139,997,137	170,146,958	50,892,567	69,339,824	67,619,469	77,285,998
Wood, Wood Products and Paper—							
Wood, Unmanufactured or Partially Manufactured—							
Fence posts and railroad ties............ $	1,749,192	1,835,196	627,292	....	....	1,835,196	625,145
Sawmill Products—							
Cherry, chestnut, gumwood, hickory, and whitewood.....M ft.	26,264	16,446	25,546	....	....	16,387	25,522
$	2,703,478	1,088,954	1,665,581	....	....	1,082,608	1,663,096
Oak................M ft.	37,418	20,599	34,441	....	....	20,552	34,406
$	4,517,795	1,548,494	2,288,968	....	7	1,541,668	2,286,744
Pitch pine...........M ft.	37,468	27,895	26,788	....	....	27,895	26,788
$	1,773,164	724,657	1,048,129	....	....	724,657	1,048,129
Dressed on one side only..............M ft.	49,510	48,787	57,125	....	....	48,569	56,025
$	3,119,994	1,640,604	2,038,880	152	57	1,631,840	2,027,931
Other............... $	3,397,759	1,281,318	1,442,335	7,840	5,270	1,264,277	1,416,314
Other unmanufactured or partly manufactured wood............ $	1,446,405	811,880	647,428	16,677	9,035	746,765	627,768
Total Wood, Unmanufactured or Partially Manufactured....... $	18,707,787	8,931,103	9,758,613	24,669	14,369	8,827,011	9,695,127
Wood, Manufactured—							
Cooperage............ $	1,086,924	438,840	478,745	691	1,185	436,053	474,852
Corkwood, manufactures................ $	732,565	503,558	422,247	55,418	9,428	229,443	289,036
Turned and carved wood............... $	778,842	445,475	635,281	9,253	8,959	434,937	624,902
Wood pulp............ Lb.	50,168,510	28,467,019	34,943,786	2,800	5,964	28,464,219	34,937,602
$	2,667,657	1,071,358	981,344	842	978	1,070,516	980,341
Other wood manufactures............ $	6,263,753	4,290,373	4,586,127	240,244	308,034	3,729,547	4,022,981
Total Wood, Manufactured.............. $	11,529,741	6,749,604	7,103,744	306,448	328,584	5,900,496	6,392,112
Total Wood and Wood Products............ $	30,237,528	15,680,707	16,862,357	331,117	342,953	14,727,507	16,087,239

5.—Principal Imports into Canada for Consumption, etc.—*Continued*

Classification		Total Imports for Consumption (Merchandise) 1921	1922	1923	Imports from United Kingdom 1922	1923	Imports from United States 1922	1923
Wood, Wood Products and Paper—*Con.*								
Paper—								
Cardboard	$	1,697,548	842,193	780,183	15,445	16,583	825,883	762,488
Printing paper	Lb.	7,967,171	5,268,039	6,734,690	182,404	1,318,192	5,033,819	5,360,887
	$	1,039,938	478,680	525,850	35,717	101,305	437,030	419,953
Wrapping paper	Lb.	6,353,648	3,862,629	8,496,402	149,380	368,863	3,701,254	7,502,482
	$	695,218	243,567	501,810	17,668	36,369	223,742	430,027
Writing paper and stationery	$	440,968	367,392	328,170	38,519	65,306	320,620	258,022
Other paper	$	4,254,149	2,487,919	3,193,218	180,393	316,950	2,115,747	2,536,109
Paper boxes and containers	$	1,473,436	804,464	647,706	19,507	17,040	744,121	622,892
Other manufactures of paper	$	4,044,064	2,725,213	2,504,739	291,840	303,343	2,156,733	2,148,490
Total paper	$	13,645,321	7,949,428	8,481,676	599,089	856,896	6,823,876	7,177,981
Books and Printed Matter—								
Newspapers and magazines	$	2,672,629	2,607,718	1,979,950	47,911	25,767	2,557,838	1,951,886
Photographs, chromos, etc	$	1,257,649	1,022,184	818,326	124,944	115,137	868,821	685,375
Advertising pamphlets, cards, etc	Lb.	3,846,962	3,733,251	3,713,705	126,652	197,447	3,579,940	3,483,557
	$	1,807,330	1,814,055	1,581,990	64,548	84,318	1,731,942	1,476,814
Text books	$	977,905	1,027,100	913,180	415,932	328,006	539,823	493,625
Other books and printed matter	$	6,851,022	5,690,295	5,208,065	1,074,001	955,261	4,174,082	3,969,037
Total Books and Printed matter	$	13,566,535	12,161,352	10,501,511	1,727,336	1,508,489	9,872,506	8,576,737
Total Wood, Wood Products and Paper	$	57,449,384	35,791,487	35,845,544	2,657,542	2,708,338	31,423,889	31,841,957
Iron and Its Products—								
Iron ore	Ton	1,950,291	656,902	1,044,999	...	88	509,185	701,493
	$	5,995,038	1,936,247	2,588,536	...	2,889	1,721,438	2,059,109
Pigs, Ingots and Blooms—								
Pig iron	Ton	56,350	18,416	64,960	438	34,436	17,044	29,762
	$	2,311,184	425,360	1,435,623	12,348	715,608	390,238	702,909
Ferro-silicon and ferro-manganese	Cwt.	180,577	30,775	91,323	18,059	70,161	10,272	21,113
	$	1,457,998	101,651	303,973	60,162	227,665	33,274	76,159
Other pigs, ingots, blooms and billets	$	869,805	405,359	537,839	4,075	6,194	396,469	505,652
Total Pigs, Ingots and Blooms	$	4,638,987	932,370	2,277,435	76,585	949,467	819,981	1,284,720
Scrap iron or steel	$	2,419,194	343,380	242,632	193	...	338,042	236,517
Castings and forgings	$	6,790,520	3,787,460	3,304,595	661,214	258,102	3,124,351	3,046,274
Rolling Mill Products—								
Band and hoop	Cwt.	2,670,075	634,929	1,166,085	48,819	95,558	582,330	1,062,721
	$	17,117,035	3,383,701	5,431,530	462,613	642,914	2,878,346	4,602,710
Bars and rails	$	6,776,714	2,601,282	5,288,881	15,376	225,032	2,552,492	5,022,452
Plates and Sheets—								
Boiler plate	Cwt.	260,900	60,433	144,499	...	5,665	60,433	138,834
	$	1,040,554	154,114	359,408	...	13,263	154,114	346,145
Canada plates	Cwt.	197,456	154,176	307,415	18,982	119,884	135,194	187,531
	$	1,243,108	662,120	1,236,373	84,476	470,486	577,644	765,887
Tinned plates	Cwt.	1,185,776	742,213	1,068,337	267,837	700,586	474,376	367,751
	$	8,902,463	4,015,300	4,800,126	1,288,213	3,051,884	2,727,087	1,748,242
Galvanized	Cwt.	509,185	273,608	719,978	19,113	296,229	254,495	423,706
	$	3,571,129	1,398,271	3,069,973	106,809	1,214,844	1,291,462	1,854,897
Skelp, for pipe	Cwt.	2,058,050	1,011,685	1,841,211	...	2,150	1,011,685	1,839,061
	$	6,052,793	1,990,511	3,442,570	...	3,011	1,990,511	3,439,559
Other plates and sheets	Cwt.	2,330,493	838,563	2,079,642	15,094	163,163	821,501	1,914,619
	$	10,470,866	2,950,751	6,474,907	71,656	558,780	2,871,279	5,912,947
Rods	Cwt.	590,222	356,035	423,528	1,154	6,519	335,714	362,858
	$	1,744,965	758,942	881,826	2,231	11,520	714,293	775,815
Structural iron	$	13,137,023	2,205,574	5,587,987	3,116	80,152	2,201,773	5,496,861
Total Rolling Mill Products	$	70,056,650	20,120,566	36,573,581	2,034,490	6,271,886	17,959,001	29,965,515
Tubes, pipes and fittings	$	6,226,128	2,166,020	2,656,931	105,474	182,898	2,028,147	2,450,622

5.—Principal Imports into Canada for Consumption etc.—*Continued*

Classification	Total Imports for Consumption (Merchandise)			Imports from United Kingdom		Imports from United States	
	1921	1922	1923	1922	1923	1922	1923
Iron and Its Products—*Con.*							
Wire—							
Barbed fencing........Cwt.	418,554	166,133	105,436	....	112	166,033	105,319
$	1,934,159	700,094	376,885	....	506	1,699,744	376,355
Other................. $	6,084,126	2,189,298	2,702,047	668,122	997,086	502,833	1,695,230
Chains................. $	1,304,654	464,288	541,539	99,307	143,211	361,648	398,200
Engines and Boilers—							
Engines, internal combustion, n.o.p. (incl. automobile engines).No.	34,714	17,062	32,812	163	176	15,898	32,635
$	7,646,314	4,090,328	5,025,297	72,248	45,459	4,017,177	4,976,092
Locomotives and parts...............No.	63	35	22	1	....	34	22
$	679,252	228,625	213,022	6,620	....	222,005	213,022
Other boilers, engines, pumps, etc.......... $	1,391,861	518,384	1,751,294	94,517	207,951	423,867	1,543,333
Total engines and boilers............ $	9,717,427	4,837,337	6,989,613	173,385	253,410	4,663,049	6,732,447
Farm implements and machinery.......... $	24,458,834	7,718,032	8,423,995	68,832	31,041	7,546,472	8,352,071
Firearms............... $	726,073	313,886	469,831	73,819	73,973	215,888	373,561
Hardware and cutlery.. $	781,008	3,425,850	3,406,483	1,205,330	963,592	2,054,671	2,217,706
Machinery (except agricultural—							
Sewing machines and parts............... $	1,137,418	798,113	434,366	125,852	44,573	672,261	389,738
Other household machinery.......... $	835,448	536,914	531,902	174	1,007	536,740	530,198
Mining and metallurgical................ $	1,651,754	1,365,427	1,619,943	67,022	104,656	1,298,225	1,515,287
Office or business..... $	2,278,967	1,158,924	1,382,415	214	5,141	1,156,971	1,375,425
Printing and bookbinding............. $	3,739,089	2,225,703	2,831,328	77,851	51,984	2,140,571	2,769,459
Paper and pulp mill... $	2,487,993	2,130,341	1,231,113	360,190	230,488	1,756,634	987,507
Textile................ $	6,199,562	2,636,903	3,122,014	675,923	359,716	1,853,129	2,688,637
Other machinery...... $	27,550,974	13,208,648	12,915,498	832,820	528,024	12,231,362	12,296,995
Total machinery (except agricultural)... $	45,881,205	24,060,973	24,068,579	2,140,046	1,325,589	21,645,893	22,553,246
Springs................ $	559,454	181,173	225,525	3,210	2,508	177,932	222,778
Stamped and coated products.............. $	1,909,107	1,511,308	1,350,685	77,705	77,378	1,420,591	1,253,944
Tools and hand implements.............. $	2,562,029	1,181,696	1,540,909	93,270	134,282	1,059,952	1,374,149
Vehicles—							
Automobiles, freight..No.	1,706	806	1,082	11	23	790	1,059
$	3,578,938	1,537,765	1,889,105	37,411	77,169	1,492,290	1,811,936
Automobiles, passenger.................No.	5,907	7,181	11,402	74	34	7,092	11,362
$	8,399,537	9,501,362	11,857,165	392,578	135,275	9,062,184	11,710,972
Automobile parts..... $	11,760,367	10,211,791	14,134,874	20,694	59,521	10,189,926	14,065,719
Railway cars of all kinds No.	1,769	901	1,144	100	....	801	1,144
$	1,011,129	458,368	439,279	15,861	....	442,507	439,279
Railway cars, parts of. $	914,573	426,615	246,485	5,670	....	420,945	246,485
Other vehicles...... $	1,065,153	452,996	557,996	66,694	72,934	386,302	484,467
Total vehicles....... $	26,729,697	22,588,897	29,124,904	538,908	344,899	21,994,154	28,758,858
Other iron and steel..... $	21,851,413	11,751,664	11,859,750	966,013	658,716	10,604,448	11,020,583
Total Iron and Its Products........... $	245,625,703	110,210,539	138,724,455	8,985,903	12,671,433	99,938,235	124,371,885
Non-Ferrous Metals—							
Aluminium and its products............... $	3,252,236	1,475,670	2,946,761	88,086	176,399	1,320,389	2,693,229
Brass and its products.. $	6,061,562	3,234,269	3,975,839	352,827	483,452	2,824,078	3,427,293
Copper—							
Bars and rods........ Cwt.	331,890	113,449	274,962	30	24	113,419	274,938
$	5,724,064	1,641,847	4,040,386	736	540	1,641,111	4,039,846
Blocks, pigs, ingots... Lb.	7,448,447	401,119	2,984,363	....	....	401,119	2,984,363
$	1,396,327	54,138	452,748	....	....	54,138	452,748
Other............... $	2,492,135	1,092,074	1,808,294	50,899	117,794	1,012,534	1,685,866
Total Copper....... $	9,612,526	2,788,059	6,301,428	51,635	118,334	2,707,783	6,178,460

5.—Principal Imports into Canada for Consumption, etc.—*Continued*

Classification		Total Imports for Consumption (Merchandise) 1921	1922	1923	Imports from United Kingdom 1922	1923	Imports from United States 1922	1923
Non-Ferrous Metals—*Con.*								
Lead and its products..	$	2,324,248	239,306	412,721	89,010	174,547	101,116	176,284
Nickel and its products.	$	2,629,406	1,604,197	1,866,828	109,964	124,389	1,453,788	1,705,730
Precious metals and their products........	$	2,753,571	1,548,876	1,596,898	442,215	501,398	1,051,458	1,071,046
Tin and its products....		2,962,644	1,324,590	1,804,814	482,132	704,046	720,159	949,010
Zinc and its products...	$	584,474	403,646	493,733	33,267	25,890	235,719	381,376
Other Non-Ferrous Metal Products—								
Clocks and watches..	$	3,923,523	2,129,811	1,680,481	30,917	52,780	1,215,891	897,397
Electric apparatus, n.o.p...............	$	16,918,568	11,033,465	12,109,775	566,954	967,963	10,040,201	10,375,454
Gas apparatus........	$	264,291	190,964	203,982	10,457	7,062	176,999	192,703
Printing materials (except machinery).	$	325,934	299,226	298,125	28,688	17,967	269,028	275,334
Other...............	$	4,038,336	3,501,334	3,801,219	237,716	241,411	3,176,486	3,467,921
Total Non-Ferrous Metals...........	$	55,651,319	29,773,413	37,492,604	2,523,868	3,595,638	25,343,095	31,791,237
Non-Metallic Minerals—								
Asbestos other than crude................	$	977,160	577,075	543,132	99,981	94,162	473,572	447,108
Clay and Clay Products—								
Brick and tile........	$	3,571,121	1,619,853	2,050,615	298,707	428,046	1,305,199	1,606,600
Pottery and chinaware	$	5,378,748	3,997,696	3,541,388	2,840,385	2,457,365	387,898	388,585
Other................	$	1,831,723	1,160,816	1,281,619	378,760	427,764	781,718	852,600
Total Clay and Clay Products...........	$	10,781,592	6,778,365	6,873,622	3,517,852	3,313,175	2,474,815	2,847,785
Coal and Coal Products—								
Coal, anthracite......	Ton	4,839,559	4,416,255	3,155,613	110	247,833	4,415,921	2,906,554
	$	39,058,148	39,000,610	28,089,041	1,355	2,350,292	38,997,455	25,725,606
Coal, bituminous.....	Ton	15,407,996	12,752,059	11,166,937	5,083	650,331	12,746,976	10,515,702
	$	72,239,952	39,258,115	44,025,436	30,620	3,380,533	39,227,495	40,639,950
Coke.................	Ton	548,582	232,174	443,883	....	2,907	232,174	440,976
	$	6,247,931	1,673,171	4,290,974	....	23,371	1,673,171	4,267,603
Other coal products..	$	322,257	444,630	1,230,594	68,885	519,074	375,745	382,080
Total Coal and Coal Products	$	117,868,288	80,376,526	77,636,045	100,860	6,273,270	80,273,866	71,015,239
Glass and Glassware—								
Carboys, bottles, jars, etc..................	$	1,584,207	738,523	895,487	19,424	30,007	673,975	819,711
Common window glass...............	Sq.ft.	25,571,766	10,522,229	26,873,869	635,590	8,329,689	229,423	461,294
	$	2,872,151	624,386	1,205,639	40,249	373,150	28,917	48,196
Plate glass...........	$	2,506,633	1,432,989	2,328,191	390,438	703,101	231,681	245,420
Other glass and glassware...............	$	4,120,037	2,596,636	2,642,442	235,695	204,671	2,029,763	2,020,201
Total Glass and Glassware...............	$	11,083,028	5,392,534	7,071,759	685,806	1,310,929	2,964,336	3,133,528
Graphite and its products.................	$	162,566	81,213	89,939	25,664	31,281	55,549	57,672
Petroleum, Asphalt and Their Products—								
Asphalt and asphalt oil.................	$	695,854	586,837	566,741	185	6,969	539,501	559,724
Crude petroleum for refining............	Gal.	311,719,057	391,292,960	397,603,716	....	....	254,948,364	261,750,905
	$	22,652,012	19,610,945	20,051,248	....	....	12,960,563	13,001,891
Coal and kerosene oil, refined.............	Gal.	16,720,030	8,262,611	3,532,139	700	374	8,261,791	3,526,524
	$	2,578,802	451,473	346,062	157	302	451,264	343,702
Gasoline, n.o.p.......	Gal.	....	21,188,271	1,892,996	....	....	14,078,395	1,892,644
	$	....	3,343,388	375,458	....	....	2,614,503	375,266
Lubricating oils......	Gal.	5,126,992	4,940,282	7,322,916	14,117	14,159	4,925,550	7,308,740
	$	2,519,610	1,678,915	2,151,072	10,439	14,392	1,667,740	2,136,641
Other oils............	$	11,121,149	7,667,182	12,426,253	1,122	1,163	6,872,157	12,104,896
Other petroleum products...............	$	11,870,924	903,323	798,235	20,321	9,628	882,463	788,358
Total Petroleum, Asphalt and Their Products...........	$	51,438,351	34,242,063	36,715,069	32,224	32,454	25,988,191	29,310,478
Stone and its products..	$	5,481,072	3,135,916	4,060,806	299,190	376,220	2,620,977	3,489,510
Miscellaneous—								
Carbons, electric.....	$	783,751	273,213	493,765	1,228	150	271,485	493,523
Diamonds, unset.....	$	2,384,150	3,146,466	1,955,495	1,137,654	604,158	54,012	48,960
Salt..................	Cwt.	3,019,228	2,701,596	3,959,077	568,570	714,477	1,512,838	2,031,523
	$	1,372,199	1,073,724	1,267,722	374,915	412,643	589,517	687,123

5. Principal Imports into Canada for Consumption, etc.—*Concluded.*

Classification		Total Imports for Consumption (Merchandise)			Imports from United Kingdom		Imports from United States	
		1921	1922	1923	1922	1923	1922	1923
Non-Metallic Minerals—*Con.*								
Miscellaneous—*Con.*								
Sulphur	Lb.	237,809,435	157,198,236	246,020,164	8,290	1,232	157,168,316	245,867,692
	$	1,729,808	1,272,170	1,673,662	211	67	1,271,397	1,670,736
Other non-metallic minerals	$	2,033,148	1,254,875	1,537,996	49,205	60,146	1,178,936	1,440,198
Total Non-Metallic Minerals	$	206,095,113	137,604,140	139,919,012	6,324,790	12,508,655	118,216,653	114,641,860
Chemicals and Allied Products—								
Acids	$	889,996	493,101	538,009	96,697	87,367	298,921	340,622
Alcohols, industrial	Gal.	1,342,794	165,382	18,413	20	....	95,712	14,034
	$	1,650,254	641,915	35,579	109	....	553,909	23,733
Cellulose products	$	1,420,374	1,076,384	892,868	55,832	57,637	994,246	770,637
Drugs and medicinal preparations	$	3,457,913	2,444,323	2,354,606	751,285	897,925	1,312,828	1,095,881
Dyeing and Tanning Materials—								
Coal tar dyes	Lb.	3,590,912	2,242,486	3,735,286	313,920	330,657	1,654,372	2,518,141
	$	3,206,889	2,286,483	2,377,325	224,968	169,135	1,348,208	1,343,146
Logwood, etc., extract	Lb.	28,192,453	32,665,665	32,866,699	242,185	567,329	27,834,400	29,295,133
	$	1,890,940	1,376,602	1,254,787	10,751	27,784	1,148,126	1,118,345
Other dyeing and tanning articles	$	933,737	430,425	422,018	17,807	14,171	402,228	353,727
Total Dyeing and Tanning Materials	$	6,031,566	4,093,510	4,054,130	253,526	211,090	2,898,562	2,815,218
Explosives	$	750,385	201,184	601,744	26,880	45,874	147,142	293,953
Fertilizers	$	4,427,564	1,887,384	2,051,975	40,964	5,070	1,647,301	1,507,733
Paints, pigments and varnishes	$	4,251,620	2,838,466	3,550,455	440,894	620,603	1,926,621	2,527,090
Perfumery, cosmetics, etc	$	1,202,585	955,259	871,568	63,577	75,668	441,363	507,021
Soaps	$	1,424,446	1,211,553	1,280,654	73,704	91,926	1,044,852	1,093,664
Inorganic chemicals, n.o.p	$	7,149,704	5,351,031	6,107,231	499,315	647,303	4,596,172	5,044,653
Other chemicals and allied products	$	5,231,042	3,436,223	3,454,282	934,334	895,550	2,281,398	2,327,340
Total Chemicals and Allied Products	$	37,887,449	24,630,333	25,793,101	3,237,117	3,636,013	18,143,315	18,347,545
Miscellaneous Commodities—								
Amusement and sporting goods	$	4,245,844	3,641,610	3,488,993	302,900	309,616	2,898,705	2,693,989
Brushes	$	1,077,718	607,000	601,593	104,505	114,395	316,319	306,797
Containers	$	3,580,017	2,130,109	2,354,200	1,005,343	1,154,871	707,023	800,962
Household and personal equipment	$	8,542,038	6,259,714	6,455,862	1,499,001	1,507,098	3,721,279	3,734,339
Mineral and aerated waters	$	191,433	166,537	156,866	22,127	19,494	66,318	60,173
Musical instruments	$	3,486,744	2,353,531	2,521,457	74,883	80,117	2,040,439	2,297,117
Scientific and educational equipment	$	3,765,608	3,405,251	2,905,080	262,074	266,333	2,721,148	2,401,716
Ships and materials for, n.o.p	$	3,034 247	849,958	2,183,759	236,836	45,146	598,331	1,859,064
Vehicles, n.o.p	$	964,880	521,283	602,387	2,918	89,508	518,324	511,782
Works of art, n.o.p	$	875,350	540,280	604,643	231,681	275,997	186,436	172,831
Miscellaneous articles Imported under Special Conditions—								
Articles for army and navy	$							1,299
Articles re-imported	$	228,918	92,173	39,910	61,724	21,488	159	1,824,454
Articles for exhibition	$	6,099,249	5,897,586	2,660,550	3,369,858	626,709	2,060,178	1,052,140
Articles ex-warehoused		758,715	1,328,048	1,158,788	187,210	95,566	1,128,914	
for ships' stores	$							3,921,143
Other	$	5,959,868	3,270,718	4,365,565	135,619	269,727	3,017,119	1,008,767
		6,472,132	2,922,693	1,276,077	1,441,448	167,815	1,358,992	
Total Miscellaneous Articles Imported under Special Conditions	$							7,807,803
		19,518,882	13,511,218	9,500,890	5,195,859	1,181,305	7,565,362	
Settlers' effects	$							4,985,266
All other articles		10,749,819	7,625,534	6,205,085	1,409,020	1,041,121	6,044,233	
imported	$							7,143,198
		12,655,492	8,873,946	8,555,996	1,123,089	933,383	6,976,114	
Total Miscellaneous Commodities	$							34,775,037
		72,688,072	50,485,971	46,136,811	11,470,236	7,018,384	34,360,031	
Total Imports for Consumption	$							540,917,432
		1,240,158,882	747,804,332	802,465,043	117,135,343	141,287,671	515,958,196	

6 Principal Exports of Canadian Produce from Canada, Fiscal Years 1921, 1922 and 1923, also Exports to the United Kingdom and the United States, 1922 and 1923

Classification		Total Exports of Canadian Produce (Mdse.)			Exports to United Kingdom		Exports to United States	
		1921	1922	1923	1922	1923	1922	1923
Vegetable Products, A. Mainly Foods—								
Fruits—								
Fresh—								
Apples	Brl.	1,358,499	1,845,955	1,460,656	1,315,938	1,325,658	486,445	71,744
	$	8,299,099	8,854,379	6,452,044	6,244,209	5,842,200	2,381,419	325,385
Other	$	947,482	894,143	975,188	73,748	85,836	814,674	882,991
Dried	Lb.	2,098,628	4,378,367	562,502	1,109,360	259,370	855,754	35,175
	$	322,777	537,582	66,349	116,907	31,015	92,569	4,657
Canned or preserved	$	751,520	1,295,725	850,385	946,276	648,526	322,708	159,267
Cider	Gal.	72,544	131,431	93,910	11,737	8,000	118,404	85,615
	$	52,565	71,194	31,779	3,871	1,300	66,489	30,248
Total Fruits	$	10,373,443	11,653,023	8,375,745	7,385,011	6,608,877	3,677,859	1,402,548
Vegetables—								
Fresh—								
Potatoes	Bush.	5,036,769	3,755,529	2,798,842	....	....	1,322,004	771,638
	$	9,657,612	2,936,676	1,887,075	....	....	1,204,620	456,588
Turnips	Bush.	1,786,755	1,664,223	2,023,648	....	....	1,648,803	2,010,918
	$	460,506	461,633	313,167	....	....	456,044	309,906
Canned	Lb.	4,779,126	4,745,397	11,033,167	2,819,082	5,422,178	1,539,644	3,659,093
	$	408,203	321,635	841,401	232,192	538,304	58,379	165,686
Other	$	315,045	311,024	187,696	779	460	280,213	152,993
Total Vegetables	$	10,841,366	4,030,968	3,229,339	232,971	538,764	1,999,256	1,085,173
Grains and Farinaceous Products—								
Grains—								
Barley	Bush.	8,563,553	12,580,979	14,584,005	9,481,888	11,854,372	5,167	949,408
	$	11,469,050	9,821,087	9,164,756	7,582,764	7,441,853	3,018	507,656
Oats	Bush.	14,321,048	36,195,127	29,022,347	20,735,804	20,965,361	3,217,419	842,931
	$	14,152,033	18,717,105	14,533,015	10,738,497	10,113,856	1,446,014	412,742
Pease	Bush.	169,525	261,973	266,353	15,976	36,147	175,175	162,935
	$	847,434	834,934	756,846	68,448	117,100	543,862	429,675
Rice	Lb.	2,357,384	172,825	5,751	....	....	885	....
	$	223,732	6,761	258	....	....	66	....
Rye	Bush.	3,201,430	3,180,502	10,129,350	1,110,899	7,200,399	105,631	441,229
	$	6,231,170	3,526,639	8,152,876	1,096,888	5,664,209	97,597	338,138
Wheat	Bush.	129,215,157	136,489,238	215,074,566	92,498,351	166,846,960	16,592,797	16,213,629
	$	310,952,138	179,990,730	252,145,805	119,976,127	192,002,549	23,335,277	18,828,694
Other	$	441,964	424,409	711,651	73,081	125,055	171,857	419,549
Total Grains	$	344,317,521	213,321,665	285,465,207	139,535,805	215,464,622	25,597,691	20,936,454
Milled Products—								
Bran, shorts and middlings	Cwt.	819,781	954,616	1,924,522	4,791	7,394	854,829	1,725,023
	$	1,481,097	1,103,890	2,194,326	3,957	7,160	939,910	1,917,732
Oatmeal	Cwt.	397,266	651,135	379,237	571,347	328,333	12,710	15,510
	$	2,343,965	2,525,407	1,596,527	2,214,820	1,375,518	43,994	71,990
Wheat flour	Brl.	6,107,032	7,414,282	10,227,060	4,737,020	4,723,527	570,567	612,564
	$	66,520,490	53,478,150	60,075,426	33,943,408	27,174,526	3,824,832	3,883,424
Other	$	382,719	158,479	178,833	49,227	47,845	2,126	1,998
Total Milled Products	$	70,728,271	57,265,926	64,045,112	36,211,412	28,605,049	4,810,862	5,875,144
Prepared Foods and Bakery Products—								
Cereal foods, prepared	$	854,254	816,575	510,593	773,292	466,842	15,997	14,641
Other	$	442,229	326,136	102,443	218,714	20,985	16,659	13,764
Other Grains and Farinaceous Products—								
Malt	Bush.	629,620	124,583	128,106	....	....	30,549	....
	$	1,350,201	237,510	176,564	....	....	63,625	....
Other	$	702,144	53,661	340,894	....	2,773	53,661	337,474
Total Grains and Farinaceous Products	$	418,394,620	272,021,473	350,640,813	176,739,223	244,560,271	30,558,495	27,177,477
Sugar and Its Products—								
Confectionery	$	1,190,718	440,174	433,492	45,736	40,774	29,124	3,679
Maple sugar and syrup	$	1,994,025	173,541	386,411	6,463	9,200	165,593	376,199
Sugar, n.o.p.	Lb.	65,706,539	140,883,112	292,441,281	113,178,263	202,955,300	373,775	600,525
	$	11,837,930	10,922,436	19,755,985	9,050,710	13,641,327	34,963	39,198
Other	$	113,852	85,306	33,428	19,727	11,516	60,104	21,292
Total Sugar and its Products	$	15,136,525	11,621,457	20,609,316	9,122,636	13,702,817	289,784	440,368

6.—Principal Exports of Canadian Produce from Canada, etc.—*Continued*

Classification		Total Exports of Canadian Produce (Mdse.)			Exports to United Kingdom		Exports to United States	
		1921	1922	1923	1922	1923	1922	1923
Vegetable Products, A. Mainly Food—*Con.*								
Tea and Coffee—								
Coffee	Lb.	13,473	10,884	19,427	....	....	1,135	3,312
	$	5,351	3,546	5,751	....	....	374	1,058
Other vegetable products for food	$	231,620	782,871	564,287	482,467	219,791	93,094	126,337
Total Vegetable Products, A. Mainly Food	$	454,982,925	300,113,338	383,425,251	193,962,308	265,630,520	36,618,862	30,232,961
Vegetable Products, B. Other than Food—								
Beverages—								
Brewed	Gal.	793,172	472,735	1,509,763	3,000	44	312,550	1,349,202
	$	912,964	849,285	2,866,351	4,080	54	687,467	2,696,400
Distilled—								
Whiskey	Gal.	370,918	193,773	407,718	84,155	44,598	20,228	28,568
	$	1,697,158	925,895	2,983,524	193,270	68,800	235,183	476,963
Other	Gal.	530,096	4,620	5,807	....	1	157	336
	$	590,736	11,411	54,424	....	15	3,160	5,453
Fermented	Gal.	2,441	2,100	870	....	212	87	61
	$	6,774	3,658	2,027	....	443	177	92
Total Beverages	$	3,207,632	1,790,249	5,906,326	197,350	69,312	925,987	3,178,908
Gum, chicle	Lb.	131,152	11,122	....	....	....	11,122	....
	$	197,416	3,396	....	....	....	3,396	....
Oilcake and meal	Cwt.	195,247	413,916	447,202	59,180	84,181	15,640	16,115
	$	663,834	1,010,152	1,084,954	143,517	200,500	32,189	40,058
Oils, vegetable	Gal.	275,459	397,923	178,095	102	....	375,840	123,504
	$	197,482	91,192	....	235	....	73,992	53,765
Rubber—								
Raw and waste	$	133,516	62,623	90,126	....	....	62,623	90,126
Boots and shoes	$	1,524,969	709,299	1,367,327	212,491	305,773	8,217	1,086
Tires	$	8,253,986	2,811,652	4,955,936	1,098,428	1,206,326	72,750	9,370
Other manufactures	$	927,057	478,235	519,512	17,252	15,421	287,423	138,482
Total Rubber	$	10,839,528	4,061,809	6,932,901	1,328,171	1,527,520	431,013	239,064
Seeds—								
Clover	Bush.	179,255	258,401	304,908	22,365	73,058	229,110	197,648
	$	2,005,460	1,809,281	2,017,239	184,229	547,807	1,546,933	1,230,107
Flax seed	Bush.	1,404,119	3,633,513	2,495,387	16,392	1,319	3,617,101	2,494,068
	$	3,848,102	6,615,071	5,505,853	46,462	5,276	6,568,563	5,500,577
Other	$	231,116	369,706	171,951	23,194	21,156	337,370	126,607
Total seeds	$	6,084,678	8,794,058	7,695,043	253,885	574,239	8,452,866	6,857,291
Tobacco—								
Cigarettes	Lb.	69,861	24,205	44,703	....	30	69	50
	$	41,983	24,743	25,798	....	80	262	124
Other	$	168,861	234,886	34,316	138,635	248,993	21,045	30,353
Other Vegetable Products, not food—								
Hay	Ton	179,398	31,287	58,300	4,076	29,035	19,435	14,585
	$	4,210,594	650,379	927,143	96,911	500,881	347,104	161,065
Senega root	Lb.	268,363	181,894	415,018	10,564	18,984	156,683	363,210
	$	283,830	124,748	281,032	7,469	12,655	108,097	244,543
Other	$	1,261,681	680,013	1,052,426	70,884	64,162	572,396	853,741
Total Vegetable Products, B. Other than Food	$	27,157,519	17,465,625	24,334,841	2,237,057	3,198,342	10,968,347	11,658,912
Total Vegetable Products (A and B)	$	482,140,444	317,578,963	407,760,092	196,199,365	268,828,862	47,587,209	41,891,873
Animals and Their Products—								
Animals, living—								
For exhibition	$	....	....	317,258	....	....	....	316,358
For improvement of stock	$	773,907	368,786	220,382	895	792	362,794	206,601
Other—								
Cattle, 1 year or less	No.	72,822	51,334	29,355	....	....	51,257	29,125
	$	1,474,521	413,855	262,161	....	....	413,188	257,529
Cattle more than 1 year old	No.	223,689	161,483	229,080	35,418	25,758	121,060	199,272
	$	19,989,370	7,852,111	8,738,243	4,139,391	2,809,796	3,299,633	5,609,998

6.—PRINCIPAL EXPORTS OF CANADIAN PRODUCE FROM CANADA, ETC.—*Continued*

Classification		Total Exports of Canadian Produce (Mdse.)			Exports to United Kingdom		Exports to United States	
		1921	1922	1923	1922	1923	1922	1923
ANIMALS AND THEIR PRODUCTS—*Con.*								
Animals, living—*Con.*								
Horses	No.	3,626	2,251	1,863	....	....	2,129	1,477
	$	780,977	535,428	278,178	....	....	517,518	220,893
Poultry	$	781,280	798,401	542,241	....	....	797,481	541,339
Sheep	No.	185,382	100,350	75,154	1,178	....	97,119	73,691
	$	1,717,734	562,452	473,798	13,230	....	535,612	463,988
Other	$	365,874	554,454	488,705	315	4,782	544,345	476,666
Total Animals, living	$	25,883,663	11,085,487	11,320,966	4,153,831	2,815,370	6,470,571	8,093,372
Bones, horns and hoofs	$	320,505	84,357	134,431	....	560	82,582	126,977
Fishery Products, n.o.p.—								
Fish—								
Fresh—								
Halibut	Cwt.	55,695	66,339	56,559	941	....	65,165	56,354
	$	913,085	854,992	753,667	16,690	....	835,166	751,482
Herrings	Cwt.	377,689	213,312	274,818	....	....	213,267	274,738
	$	1,058,124	396,860	483,779	....	....	396,607	483,372
Lobsters	Cwt.	52,643	72,926	42,252	....	....	72,926	42,252
	$	1,033,738	1,403,257	1,041,713	....	....	1,403,257	1,041,713
Mackerel	Cwt.	48,141	58,915	104,884	....	16	58,915	104,868
	$	573,712	560,074	858,239	....	96	560,074	858,143
Salmon	Cwt.	87,168	106,702	97,773	8,875	7,150	96,830	89,142
	$	743,812	993,373	934,172	244,436	149,018	735,064	778,158
Smelts	Cwt.	59,921	82,655	56,446	....	....	82,655	56,446
	$	774,359	1,064,388	803,009	....	....	1,064,388	803,009
Whitefish	Cwt.	108,080	105,966	103,931	....	....	105,966	103,931
	$	1,330,690	1,150,511	1,111,078	....	....	1,150,511	1,111,078
Other fresh	$	3,012,703	2,739,316	2,705,948	1,146	....	2,733,954	2,700,335
Total Fresh Fish	$	9,440,223	9,162,771	8,691,605	262,272	149,114	8,879,021	8,527,290
Canned—								
Herrings	Cwt.	20,588	11,740	16,757	6	76	457	563
	$	274,354	93,339	144,590	79	404	3,880	4,566
Lobsters	Cwt.	66,585	72,440	76,227	33,249	33,358	15,691	20,205
	$	5,179,569	3,756,443	4,807,714	1,797,467	2,143,779	736,521	1,215,854
Salmon	Cwt.	308,578	436,239	321,969	159,004	62,284	5,449	5,920
	$	7,580,977	6,433,252	4,489,509	3,473,776	1,358,405	18,457	178,965
Other	$	634,778	384,501	364,068	1,623	15,653	239,682	253,841
Total Canned Fish	$	13,669,678	10,667,535	9,805,881	5,272,945	3,518,241	998,540	1,653,226
Fish, Dried, Salted, Smoked or Pickled—								
Codfish	Cwt.	582,084	825,080	696,874	592	437	264,070	230,980
	$	5,988,518	6,159,550	5,212,715	3,494	3,381	1,612,615	1,425,380
Haddock	Cwt.	48,919	39,293	49,040	125	9	16,926	26,601
	$	447,594	301,782	316,038	1,297	90	155,174	162,210
Herring	Cwt.	751,622	798,841	798,974	....	70	77,734	88,827
	$	1,877,332	1,600,180	1,549,565	....	490	321,758	308,505
Mackerel	Cwt.	61,298	44,066	70,385	....	....	29,651	44,906
	$	564,228	383,617	529,819	....	....	268,061	397,483
Pollock, hake and cusk	Cwt.	83,671	86,987	88,638	168	....	18,673	26,713
	$	602,259	468,290	457,352	750	....	51,002	71,213
Other	$	470,202	527,877	893,186	140	299	217,688	423,067
Total Fish, Dried, Salted, Smoked or Pickled	$	9,950,133	9,441,296	8,958,675	5,681	4,260	2,626,298	2,787,858
Other fishery products	$	270,330	109,355	101,556	100	3,587	102,335	88,657
Total Fishery Products	$	33,330,364	29,380,957	27,557,717	5,540,998	3,675,202	12,606,194	13,057,031
Furs, Hides and Leather—								
Furs—								
Undressed	$	11,731,061	14,795,337	16,206,225	4,253,569	4,743,986	10,460,991	11,290,514
Dressed	$	168,215	41,013	86,053	13,119	24,548	13,955	48,194
Manufactures	$	331,168	141,849	92,466	62,773	17,225	51,301	36,482
Total Furs	$	12,230,444	14,978,199	16,384,744	4,329,461	4,785,759	10,526,247	11,375,190
Hides and skins	$	4,732,207	4,027,427	7,399,951	47,686	62,173	3,936,788	7,226,747

6.—Principal Exports of Canadian Produce from Canada, etc.—*Continued*

Classification	Total Exports of Canadian Produce (Mdse.)			Exports to United Kingdom		Exports to United States	
	1921	1922	1923	1922	1923	1922	1923
Animals and Their Products—*Con.*							
Leather, Unmanufactured—							
Harness.......... $	435,076	360,248	668,072	25,031	1,146	330,513	662,290
Sole.......... Lb.	1,391,510	5,614,385	4,051,657	1,738,993	542,831	3,715,634	3,138,187
$	870,183	1,710,518	1,343,830	516,140	176,098	1,126,450	1,014,446
Upper.......... $	3,397,075	2,344,024	2,581,129	1,149,446	772,792	1,125,604	1,692,469
Other.......... $	436,094	350,410	131,360	7,530	4,251	304,831	124,092
Total Leather, Unmanufactured..... $	5,138,428	4,765,200	4,724,391	1,698,147	954,287	2,887,398	3,493,297
Leather, Manufactured—							
Boots and shoes..... $	1,441,338	272,346	130,034	82,764	16,740	162,859	65,453
Other.......... $	501,603	134,239	178,161	5,402	24,402	115,204	132,663
Total Leather....... $	7,081,369	5,171,785	5,032,586	1,786,313	995,429	3,165,461	3,691,413
Hair.......... $	226,365	136,975	255,241	1,453	2,127	135,522	249,645
Meats—							
Fresh—							
Beef..........Cwt.	519,994	283,566	290,285	57,973	79,878	216,478	182,640
$	8,331,298	3,324,037	2,932,573	662,313	530,301	2,550,093	2,156,747
Other.......... $	2,705,871	2,487,935	1,842,281	263,692	139,830	2,124,751	1,601,630
Cured, Canned or Prepared—							
Bacon and hams.....Cwt.	982,338	992,080	1,015,901	986,623	1,008,183	1,404	1,680
$	31,492,407	23,012,480	22,536,397	22,873,449	22,364,762	47,991	44,257
Beef, pickled........Cwt.	15,072	483	1,173	37	....	4	247
$	173,291	5,676	9,172	512	....	46	4,175
Canned meats....... Lb.	437,239	708,321	179,632	690,004	163,276	3,446	....
$	220,437	213,397	56,151	207,583	52,969	1,288	....
Pork, pickled........Cwt.	6,118	6,410	5,368	....	....	331	19
$	110,750	68,679	48,895	....	....	1,908	333
Other meats........ $	1,467,466	714,343	819,195	337,773	445,359	173,405	229,871
Total Meats...... $	44,501,520	29,826,547	28,244,664	24,345,322	23,533,221	4,899,482	4,037,013
Milk and Its Products—							
Cream, fresh..........Gal.	1,279,195	1,671,678	1,712,241	....	....	1,671,678	1,712,241
$	1,987,461	2,479,080	2,793,937	....	....	2,479,080	2,793,937
Milk, fresh.......... Gal.	1,508,618	1,391,299	856,039	....	....	1,391,299	856,039
$	412,916	311,922	189,301	....	....	311,922	189,301
Butter.......... Lb.	9,739,414	8,430,591	21,994,578	3,713,709	17,527,607	3,032,939	2,423,086
$	5,128,831	3,224,390	8,243,138	1,444,657	6,429,378	1,080,357	979,888
Casein.......... Lb.	....	23,615	20,060	....	....	23,615	20,060
$	....	1,413	1,281	....	....	1,413	1,281
Cheese.......... Lb.	133,620,340	133,849,760	114,548,900	125,942,940	106,550,400	2,969,759	5,902,300
$	37,146,722	25,440,322	20,828,234	24,007,726	19,428,127	464,189	984,084
Milk, condensed, and milk powder........ Lb.	49,147,451	34,042,679	30,309,152	16,180,302	11,179,488	4,894,690	7,298,416
$	8,187,937	5,085,110	3,244,913	2,276,575	1,006,168	844,888	895,305
Total Milk and Its Products.......... $	52,863,867	36,542,237	35,300,804	27,728,958	26,863,673	5,181,849	5,843,796
Oils, Fats, Greases and Wax—							
Animal oils.......... Gal.	16,440	136,132	62,193	8,112	1,267	6,255	1,231
$	45,947	146,355	69,680	14,987	4,593	2,992	385
Fish oils.......... Gal.	275,605	389,398	558,879	211	145,096	374,414	409,403
$	251,019	140,937	234,764	105	71,669	131,238	161,431
Lard..........Cwt.	30,961	47,959	42,633	32,530	30,667	19	134
$	617,334	686,394	595,115	471,266	442,988	241	1,641
Tallow..........Cwt.	18,964	16,426	14,639	44	....	15,653	14,092
$	172,146	82,806	111,915	351	....	77,525	108,016
Other grease and wax.. $	210,279	335,775	503,704	9,990	23,404	160,720	97,591
Total Oils, Fats, Greases and Wax.. $	1,296,725	1,392,267	1,515,178	496,699	542,654	372,716	369,064
Other Animal Products—							
Eggs..........Doz.	6,579,853	4,399,534	3,613,531	3,917,870	3,158,070	311,271	290,489
$	4,425,856	2,039,352	1,410,444	1,839,880	1,251,010	126,851	98,181
Sausage casings........ $	579,674	536,803	531,651	93,755	91,293	305,595	322,593
Other.......... $	887,378	596,327	753,265	4,607	6,690	581,497	734,144
Total Animals and Their Products.... $	188,359,937	135,798,720	135,841,642	70,368,963	64,628,261	48,391,355	55,225,166

6.—Principal Exports of Canadian Produce from Canada, etc.—*Continued*

Classification	Total Exports of Canadian Produce (Mdse.)			Exports to United Kingdom		Exports to United States	
	1921	1922	1923	1922	1923	1922	1923
Fibres and Textiles—							
Cotton—							
Fabrics.............. Yd.	1,734,619	583,976	900,806	46,870	78,829	77,341	62,797
$	783,072	289,245	339,315	24,735	28,165	126,600	35,759
Other.............. $	2,060,345	611,024	554,395	130,237	106,533	240,402	133,936
Flax, Hemp and Jute—							
Flax fibre and tow.... Cwt.	26,688	15,276	30,097	3,683	2,154	11,383	27,644
$	1,298,329	167,865	331,488	100,643	62,539	62,702	260,020
Other.............. $	57,692	14,174	17,176	4,503	8,472	7,372	2,316
Silk.............. $	343,077	209,715	391,015	128,707	135,823	13,308	35,750
Wool—							
Raw.............. Lb.	7,288,373	1,034,433	8,667,400	16,033	32,747	1,011,270	8,614,609
$	2,168,256	242,045	2,363,931	2,396	16,448	235,563	2,341,330
Manufactures.......... $	5,682,247	927,616	341,503	40,131	6,037	668,129	199,176
Binder twine........... Cwt.	186,124	33,693	75,199	14,767	8,371	6,811	48,062
$	3,192,174	431,128	777,354	194,178	73,997	107,021	533,372
Other fibres and textiles $	3,198,692	1,693,175	2,684,666	395,082	639,962	535,537	891,108
Total Fibres and Textiles............ $	18,783,884	4,585,987	7,850,843	1,020,612	1,077,976	1,996,634	4,432,767
Wood, Wood Products and Paper—							
Wood, Unmanufactured—							
Logs and round timber.............. $	5,871,779	4,756,123	5,868,203	46,161	60,007	3,642,837	4,672,044
Saw and Planing Mill Products—							
Planks and boards.. M. ft	1,604,463	1,158,630	2,199,133	113,223	315,699	933,862	1,748,468
$	71,079,295	39,012,295	64,010,422	5,346,363	10,398,367	30,637,830	49,717,219
Timber, square..... M. ft.	42,243	59,154	62,022	4,507	6,810	4,592	9,558
$	1,832,736	1,651,175	1,659,439	294,955	411,182	100,565	204,624
Other lumber....... $	230,918	409,473	407,070	159,984	173,264	218,353	207,612
Laths.............. M	428,644	971,070	1,401,297	12	844	961,170	1,379,711
$	3,767,830	6,092,657	8,313,267	90	5,905	6,038,779	8,167,961
Shingles............ M	1,831,659	2,231,904	2,622,035	241	64	2,217,474	2,599,691
$	9,230,581	7,632,418	10,528,319	1,054	318	7,592,181	10,463,921
Shooks............. $	1,068,390	602,740	543,309	52,857	40,941	53,974	14,207
Other saw and planing mill products.... $	645,954	515,994	865,902	4,763	39,755	411,715	620,397
Pulp wood............ Cord	1,615,467	825,967	1,096,462	....	....	825,967	1,096,462
$	21,513,594	9,879,150	10,755,655	....	....	9,879,150	10,755,655
Other unmanufactured wood.............. $	1,019,514	953,060	546,593	804,401	387,629	144,461	157,814
Total Wood, Unmanufactured............ $	116,260,591	71,505,085	103,498,179	6,710,628	11,517,368	58,719,845	84,981,454
Wood, Manufactured—							
Cooperage............ $	300,991	98,060	70,728	7,743	5,587	65,335	19,069
Wood Pulp—							
Chemical........... Cwt.	9,080,964	7,098,527	10,602,928	347,876	855,568	6,217,733	8,926,062
$	55,060,219	25,468,785	33,434,056	1,305,396	1,893,341	21,881,896	29,258,230
Mechanical.......... Cwt.	5,282,042	5,336,710	6,385,895	1,787,778	1,857,508	3,297,127	3,927,527
$	16,491,818	10,456,092	9,552,892	5,218,426	2,771,164	4,713,491	5,977,306
Other manufactures... $	3,403,343	2,241,946	1,975,910	903,504	706,579	853,242	696,916
Total Wood, Manufactured.............. $	75,256,371	38,264,883	45,033,586	7,435,069	5,376,671	27,513,964	35,951,521
Total Wood and Wood Products............ $	191,516,962	109,769,968	148,531,765	14,145,697	16,894,039	86,233,809	120,932,975
Paper—							
Paper board........... $	5,267,842	2,306,525	2,411,233	694,642	666,202	1,217,403	1,534,250
Printing Paper........ Cwt.	15,112,586	15,138,327	20,130,455	54,028	222,963	14,106,128	18,836,245
$	78,922,137	64,635,627	72,667,826	222,355	762,245	59,891,120	67,742,776
Wrapping paper........ Cwt.	340,946	162,625	391,100	46,572	149,503	2,017	53,245
$	3,672,780	1,264,654	2,887,376	388,504	1,214,237	16,540	255,248
Wall paper............ Roll	5,108,287	2,359,284	2,284,781	314,106	548,231	49,601	64,017
$	831,772	445,536	329,308	68,055	72,419	10,664	12,297
Other paper and mfrs. of.................. $	3,408,776	881,076	1,272,198	51,370	89,568	345,067	509,685
Total Paper, n.o.p.... $	92,103,307	69,533,418	79,567,941	1,424,926	2,804,671	61,480,794	70,054,256
Books and printed matter.................. $	941,209	622,501	656,499	93,672	135,658	351,069	375,830
Total Wood, Wood Products and Paper. $	284,561,478	179,925,887	228,756,205	15,664,295	19,834,368	148,065,672	191,363,061

6.—Principal Exports of Canadian Produce from Canada, etc.—*Continued*

Classification		Total Exports of Canadian Produce (Mdse.)			Exports to United Kingdom		Exports to United States	
		1921	1922	1923	1922	1923	1922	1923
Iron and Its Products—								
Ore, including chromite	Ton	26,218	6,535	3,509	20	...	6,515	3,509
	$	244,966	37,359	28,941	100	...	37,259	28,941
Pigs, Ingots, Blooms and Billets—								
Pig iron	Ton	70,160	2,511	40,813	224	...	2,287	40,813
	$	2,634,153	53,424	833,221	4,205	...	49,219	833,221
Billets, ingots and blooms	Ton	50,925	16	148	...	93	16	...
	$	2,912,471	912	3,754	...	2,032	912	...
Ferro-manganese and ferro-silicon	Ton	21,045	11,083	23,646	421	133	10,187	23,380
	$	1,059,576	568,583	962,528	27,097	9,321	506,407	943,006
Total Pigs, Ingots, Blooms and Billets	$	6,606,200	622,919	1,799,503	31,302	11,353	556,538	1,776,227
Scrap iron	Ton	77,147	50,767	169,966	187	...	48,232	164,896
	$	1,442,747	706,510	2,142,627	7,090	...	658,868	2,065,797
Castings and forgings	$	1,709,281	250,503	669,267	4,642	1,356	221,987	655,246
Rolling Mill Products—								
Bars and rods	Ton	69,340	5,432	10,134	94	2	324	557
	$	4,872,203	277,096	404,539	20,095	127	19,231	24,934
Other	$	2,872,019	847,104	464,282	...	...	707,889	305,859
Tubes, pipe and fittings	$	3,106,170	1,232,039	1,266,306	354,639	104,000	16,939	28,101
Wire	$	2,271,151	327,571	2,001,371	105,916	248,398	3,849	24,532
Engines and boilers	$	3,735,369	1,480,156	1,778,413	121,980	3,017	70,586	1,645,289
Agricultural implements	$	12,527,373	5,345,308	6,066,893	371,642	290,981	583,005	1,346,840
Firearms	$	31,207	11,405	1,022	1,101	772	1,569	204
Hardware and cutlery	$	7,332,041	1,253,124	1,139,058	603,068	297,404	135,250	122,996
Machinery	$	5,769,488	2,581,018	2,460,207	685,492	731,238	695,198	623,046
Tools	$	538,967	336,004	268,936	93,584	60,754	112,811	66,603
Vehicles—								
Automobiles, freight	No.	4,290	1,296	3,720	97	67	8	5
	$	2,602,853	611,185	1,444,549	45,496	50,612	8,450	1,689
Automobiles, passenger	No.	15,620	13,428	45,108	2,804	12,845	100	143
	$	11,376,268	7,421,619	25,606,350	1,810,384	9,110,752	57,902	73,402
Automobiles, parts of	$	4,262,325	1,151,453	2,355,066	363,160	425,597	116,129	134,957
Other	$	1,578,669	2,929,590	319,376	3,791	150	428,018	262,559
Total Vehicles	$	19,820,115	12,113,847	29,725,341	2,222,831	9,587,111	610,499	472,607
Other iron and steel	$	3,621,444	890,309	921,206	135,406	220,116	261,542	222,043
Total Iron and its Products	$	76,500,741	28,312,272	51,137,912	4,758,888	11,556,627	4,693,020	9,409,265
Non-Ferrous Metals—								
Aluminium	$	4,646,819	1,511,607	2,867,851	7,057	137,954	591,446	2,104,470
Brass—								
Old and scrap	Cwt.	21,442	33,930	73,736	...	...	33,853	73,733
	$	271,609	200,214	551,643	...	...	199,752	551,614
Other	$	327,429	155,570	210,024	96,484	127,630	9,651	15,850
Copper—								
Fine, in ore, matte, regulus	Cwt.	361,679	103,339	214,513	50,870	146,790	52,469	67,723
	$	4,336,972	1,029,417	2,035,511	382,451	1,203,191	646,966	832,320
Pigs, bars, sheets and blister	Cwt.	374,791	319,660	378,625	2	...	292,796	378,601
	$	8,334,296	4,600,564	4,949,171	47	...	4,243,209	4,948,607
Other	$	642,821	699,124	716,346	34,993	15,665	331,143	412,312
Total Copper	$	13,314,089	6,329,105	7,701,028	417,491	1,218,856	5,221,318	6,193,239
Lead	Cwt.	111,108	409,179	484,582	78,912	17,961	44,904	104,267
	$	525,656	1,718,967	2,366,467	369,083	81,063	175,938	532,028
Nickel	Cwt.	470,183	109,047	426,285	55,371	170,754	28,912	216,602
	$	9,405,291	2,689,702	8,880,641	930,830	2,666,739	901,245	5,169,405
Precious Metals—								
Gold-bearing quartz, dust, etc	$	3,038,779	2,532,050	5,449,469	326	...	2,531,724	5,449,469
Silver in ore, concentrates, etc	Oz.	2,441,270	3,211,653	6,012,624	...	...	3,211,653	6,009,885
	$	1,870,244	2,031,383	3,967,030	...	...	2,031,383	3,965,121
Silver bullion	Oz.	10,889,780	10,389,767	11,098,792	5,610,024	4,015,212	3,558,371	4,230,399
	$	9,257,188	6,679,921	7,491,962	3,634,297	2,729,068	2,241,301	2,805,669
Other	$	382,355	283,239	203,528	200	1,000	283,039	202,528
Total Precious Metals	$	14,548,566	11,526,593	17,111,989	3,634,823	2,730,068	7,087,447	12,422,787

6.—PRINCIPAL EXPORTS OF CANADIAN PRODUCE FROM CANADA, ETC.—*Continued*

Classification	Total Exports of Canadian Produce (Mdse.) 1921	1922	1923	Exports to United Kingdom 1922	1923	Exports to United States 1922	1923
NON-FERROUS METALS—*Con.*							
Zinc .... $	963,962	2,448,741	2,136,885	189,499	461,264	2,477	....
Electric apparatus ...... $	651,461	485,321	1,199,427	152,731	464,958	97,897	75,225
Cobalt .... Lb.	153,481	66,488	176,672	5,754	3,426	32,818	172,502
$	396,595	179,503	459,196	31,511	13,585	98,222	441,601
Other non-ferrous metals .... $	887,900	640,673	872,886	168,067	204,915	301,867	383,480
Total Non-ferrous Metals .... $	45,939,377	27,885,996	44,358,037	5,997,576	8,107,032	14,687,260	27,889,699
NON-METALLIC MINERALS—							
Asbestos .... $	12,955,083	4,787,030	7,188,933	314,268	274,582	2,726,583	5,247,294
Clay and clay products $	323,989	257,624	364,785	1,894	4,973	91,746	130,579
Coal .... Ton	2,277,202	1,953,053	2,089,438	350,014	39,259	1,188,326	1,672,411
$	16,501,478	13,182,440	12,956,615	2,720,872	320,559	7,095,769	9,929,931
Coal products .... $	974,313	548,928	438,659	10	....	361,456	205,130
Glass and glassware .... $	935,575	266,054	484,204	86,417	78,865	96,603	255,407
Graphite .... $	120,473	41,149	19,167	85	83	41,057	19,012
Mica .... $	660,218	230,429	589,424	21,826	19,426	205,444	566,118
Petroleum and its products .... $	766,924	888,881	1,213,979	98,576	18,527	215,407	580,728
Stone and Its Products—							
Abrasives, artificial .. $	1,526,862	380,583	1,836,022	1,154	3,193	371,188	1,816,731
Cement, Portland ... Cwt.	2,811,127	810,448	1,544,254	....	4	23,391	578,495
$	2,107,180	578,474	719,882	....	3	24,481	322,233
Other .... $	2,718,277	1,386,044	1,735,333	5,266	4,807	1,322,688	1,697,591
Other non-metallic minerals .... $	531,520	69,048	99,701	3,059	3,656	52,610	46,934
Total Non-Metallic Minerals .... $	40,121,892	22,616,684	27,646,704	3,253,427	728,674	12,605,032	20,817,688
CHEMICALS AND ALLIED PRODUCTS—							
Acids .... Cwt.	219,251	67,500	156,775	2,712	54,740	64,262	99,692
$	1,069,667	90,116	600,937	20,939	470,595	66,558	110,082
Alcohols, industrial ..... Gal.	411,296	233,073	125,879	109,156	91,390	16	18,201
$	784,228	235,143	101,112	123,228	66,956	22	18,305
Drugs, medicinal .... $	968,968	497,595	420,362	214,169	215,337	14,173	25,376
Dyeing and tanning materials .... $	33,957	46,944	26,172	28,868	19,623	15,109	4,578
Explosives .... $	1,271,702	249,789	247,476	....	32	199,831	53,209
Fertilizers .... $	4,993,176	2,213,351	3,899,896	7,809	....	1,629,780	3,298,095
Paints, pigments and varnishes .... $	1,756,045	423,604	469,742	162,903	177,651	89,908	70,360
Soap .... Lb.	992,374	1,809,509	2,192,136	993,573	1,643,227	34,408	31,993
$	143,627	227,788	300,890	138,882	227,965	3,517	1,251
Inorganic Chemicals, n.o.p.—							
Acetate of lime .... Cwt.	80,922	22,109	22,416	....	12,981	13,130	4,211
$	261,578	28,373	66,167	....	40,618	15,561	8,962
Calcium carbide .... Cwt.	1,086,138	513,650	590,545	1	1,303	478,885	457,700
$	4,618,335	2,261,054	2,358,160	4	7,860	2,122,083	1,834,140
Soda and sodium compounds .... Cwt.	....	196,776	441,856	112	11,213	113,252	189,387
$	....	1,491,018	3,244,359	365	89,472	840,443	1,296,368
Cobalt oxide and salts Lb.	415,764	302,386	453,203	11,212	101,946	164,717	265,034
$	891,045	538,083	874,429	23,549	172,546	339,747	527,446
Other .... $	351,537	223,168	328,510	4,877	1,995	156,657	243,182
Total Inorganic Chemicals, n.o.p .. $	6,122,495	4,541,696	6,871,625	28,795	312,491	3,474,491	3,910,098
Other drugs, dyes and chemicals .... $	3,222,414	980,144	1,108,728	337,164	493,791	443,747	460,186
Total Chemicals and Allied Products ... $	20,366,279	9,506,170	14,046,940	1,062,757	1,984,441	5,937,136	7,951,543
MISCELLANEOUS COMMODITIES—							
Amusement and sporting goods .... $	98,631	52,912	44,227	8,069	1,711	27,891	27,043
Containers .... $	27,959	107,571	207,100	9,280	691	74,677	61,555
Household and personal equipment .... $	971,888	434,779	269,648	90,690	41,953	156,808	97,056
Mineral waters .... $	16,480	63,329	113,548	....	....	58,904	105,275
Musical instruments ..... $	951,326	354,339	561,386	30,795	42,627	164,011	308,768
Scientific and Educational Equipment—							
Films .... $	2,493,694	2,352,235	2,948,739	15,632	707,964	2,245,754	2,182,715
Other .... $	443,810	268,433	781,421	175,116	695,383	28,892	41,647

6. Principal Exports of Canadian Procuce from Canada, etc.—*Concluded*

Classification		Total Exports of Canadian Produce (Mdse.)			Exports to United Kingdom		Exports to United States	
		1921	1922	1923	1922	1923	1922	1923
Miscellaneous Commodities—Con.								
Ships and vessels........	$	17,349,135	3,242,206	173,290	4,888	2,400	96,253	94,793
Vehicles, n.o.p...........	$	84,905	55,289	30,807	891	....	39,010	5,417
Works of art.............	$	96,114	72,563	69,407	14,479	18,937	57,179	49,661
Miscellaneous—								
Cartridges............	$	52,674	15,070	83,811	2,223	193	1,271	49,081
Settlers' effects........	$	8,822,207	6,408,583	7,971,002	580,931	687,356	5,346,795	6,635,367
Other..................	$	980,846	602,692	798,682	102,798	121,989	327,880	440,781
Total Miscellaneous Commodities.....	$	32,389,669	14,030,001	14,053,068	1,035,792	2,321,204	8,625,325	10,099,156
Grand Total, Canadian Exports....	$	1,189,163,701	740,240,680	931,451,443	299,361,675	379,067,445	292,588,643	369,080,218

BRITAIN'S HOME PRODUCTION OF MEAT AND DAIRY PRODUCTS

Trade Commissioner Harrison Watson

London, May 11, 1923.—The final report of the Ministry of Agriculture on the agricultural production of the country for 1922 differs from its annual predecessors in so far that, whereas they were confined to ordinary field crops and cattle, this also includes statistics relative to the production of meat and certain dairy products, information which is of special interest to Canada. This action is further evidence of the policy now aimed at by the British Government in order to remedy previous defects in comparison with certain other countries in the collection and publication of statistics of production. In the present instance the report states that the object is an " endeavour to form some opinion as to the aggregate output of the soil of this country."

It is, however, explained that in the case of milk, meat, and some other agricultural products, the means of arriving at an accurate estimate are by no means so good as in the case of field crops, the possibility of error being materially greater, but it is hoped that, resulting from further methods which are now being adopted, improvements will constantly be effected.

MEAT

As a preliminary it is stated that this estimate is based on the numbers of cattle, sheep, and pigs slaughtered annually, which are calculated from the differences shown in the number of stock on the 4th June as between one year and another, allowance being made for births and deaths during the twelve months.

At the time of the Census of Production of 1908, resulting from an elaborate inquiry among butchers and slaughter-house owners, it was estimated that the average weights per head of dressed carcass were: cattle, 672 pounds; calves, 98 pounds; sheep, 67 pounds; lambs, 38 pounds; and pigs, 160 pounds.

In consequence of the war and altered conditions generally, it is now found that the average weights have decreased, and as a result in the last two years the average dressed carcass weight of cattle has been estimated at 616 pounds,

and of sheep and lambs at 56 pounds per head. Upon this basis, the returns for Great Britain for 1921 and 1922 are as follows:—

	Number of Animals Slaughtered, Year ending June 4.		Estimated Weight of Meat Products Year ending June 4.	
	1922	1921	1922	1921
			Tons	Tons
Cattle..	1,601,000	1,666,000	440,000	458,000
Calves..	1,086,000	1,014,000	48,000	32,000
Sheep and Lambs..	8,157,000	6,854,000	204,000	171,000
Pigs..	4,031,000	2,763,000	288,000	197,000

and they show that the supply of home-grown meat last year amounted to 980,000 tons, supplemented by about 40,000 tons of edible offals. This represents an increase in total production of 122,000 tons compared with 1920-21, and was largely due to the larger slaughter of pigs, while there was an additional slaughter of sheep owing to the scarcity of fodder, supplemented by the high prices prevailing.

Although the comparison would always be affected by the fact that the home figures are from June to June, and the import statistics cover the calendar year, the value of the published information for the past year would be rendered nugatory in so far that the Government returns of imports for the year 1922 also include Ireland, whereas the home figures only cover Great Britain. In any case this position must be borne in mind when taking into consideration the fact that the 1922 United Kingdom imports of meat amounted to 1,322,000 tons.

MILK, BUTTER, AND CHEESE

According to the Census of Agricultural Production of 1908, the total annual yield of milk of Great Britain was estimated at 1,208,000,000 gallons; an average yield per cow in milk of 550 gallons, or 437 gallons per head of the total dairy herd. During the war the yield decreased, and according to the findings of the committee which investigated the production and distribution of milk, fell in 1918 to 436 gallons. Since then, however, improvement has taken place, and the yield recovered in 1921 to 550 gallons per cow, and to 575 gallons in 1922. It is this latter figure, or 440 gallons per head of the dairy herd, upon which the following figures of total milk production have been based:—

England and Wales	No. of Cows in Milk on June 4.	Average Yield per Cow in Milk on June 4. Gallons	Total Milk Production. Million gallons
1907-8..	1,831,000	550	1,007
1909-13 (Average)..	1,830,000	560	1,025
1914..	1,908,000	575	1,097
1921..	1,876,000	550	1,032
1922..	1,934,000	575	1,112

According to the Census of Production, 1908, 70 per cent of the milk produced in Great Britain was sold by farmers as milk. Since then the practice of selling milk appears to have increased, and probably 75 to 80 per cent, or 1,000 million gallons, of this milk is now sold in the first instance as fresh milk. This quantity, however, includes all milk sold by the farmer, of which a proportion is converted into cheese, butter, condensed milk or other products after leaving the farm. The balance of 20 to 25 per cent is made into butter or cheese on the farm or is to supply the needs of the farmers' households.

Regarding the production of cheese alone, the Ministry of Agriculture has not itself collected any recent figures, but as from a trade source it is estimated that about 50,000 tons of Cheshire cheese are made in England, it is a safe sur-

mise that the output of cheese for the whole of Great Britain is not less than double that quantity. Imports of cheese during the calendar year 1922 aggregated 135,000 tons.

According to such information as is available, it seems probable that the quantity of milk made into butter and cheese in Great Britain in 1921 was about 500 million gallons, and in addition to this 35 million gallons at least were made into condensed milk, and another appreciable quantity into cream cheese and similar articles.

Taking one consideration with another, the consumption of milk in Great Britain in 1921 was probably as follows:—

	Million Gallons.
Made into butter and cheese	500
Made into condensed milk	35
Used for human consumption as milk	600
Cream and miscellaneous manufacturing purposes	55
Allowance for waste at 2½ per cent	30
Total estimated production	1,220

In this connection it is noted that the above allowance for human consumption is equivalent to nearly one-third of a pint per day per head of the population.

EGGS AND POULTRY

The figures dealt with in the report refer only to England and Wales, in which countries the number of fowls kept on agricultural holdings in 1921 was returned as 24,816,000, or about 4,000,000 less than in 1913. The totals for 1922 have not yet been ascertained, but as poultry-keeping continues to be profitable, and the price of feeding stuffs, which was a deterrent influence, has fallen, it is probable that there was an increase. From data available, it is surmised that the annual production of eggs in England and Wales aggregates about 1,500,000.

TOTAL AGRICULTURAL OUTPUT

The report estimates that the value of the produce sold off for consumption in 1922 (including the value of produce used in farmers' households) was approximately £260,000,000. This figure is to a large extent hypothetical, as it depends upon approximate estimates of the crops and live stock sold off farms, and also on the values they may be supposed to have realized. It has, however, some value as giving a measure of the magnitude of the industry, although it is recognized that the margin of error must be considerable. The following table estimates the totals representing each group of commodities:—

Farm crops	£ 47,000,000
Live stock	108,000,000
Dairy produce	77,000,000
Wool	3,250,000
Poultry and eggs	16,000,000
Miscellaneous crops	10,000,000
	£261,250,000

CANADIAN STORE CATTLE AT DUNDEE

Trade Commissioner Gordon B. Johnson

Glasgow, May 8, 1923.—The second shipment of Canadian store cattle to Scotland since the lifting of the embargo, consisting of 528 head, arrived from Canada several days ago, and was sold on the 5th inst. at the Canadian cattle wharf at Dundee. Prominent people interested in the matter expressed surprise at the phenomenal prices realized. The average price per head obtained was £32 5s. 6d., the average per live hundredweight (112 pounds) being 65s. 9d.

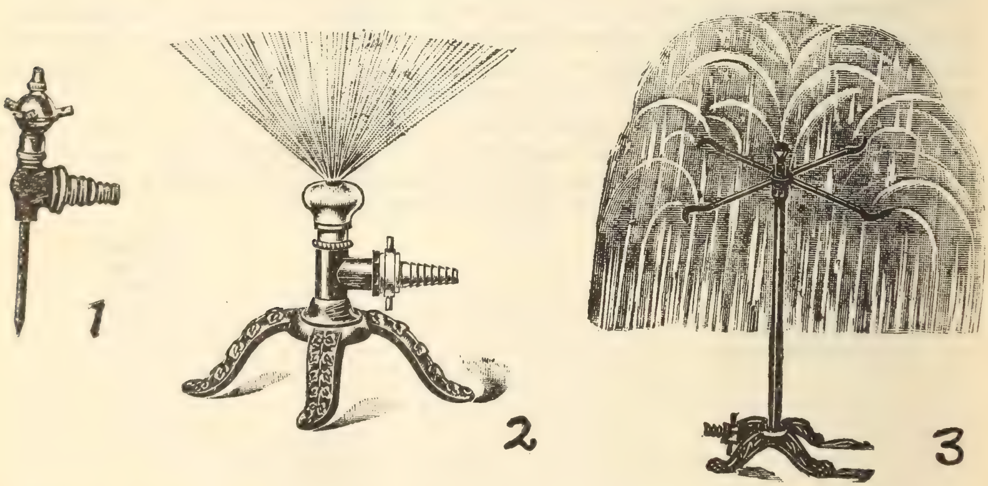
So great was the demand for admission to the sale ring that the accommodation was taxed to the utmost, a repetition of the same interest displayed at Merklands Wharf, Glasgow, on April 5, when the first shipment was sold. The prices realized on that occasion were also excellent, but the Dundee sale made an average per live hundredweight additional of more than four shillings.

While these prices appear to be excellent for those engaged in the trade, it should not be forgotten that one of the principal reasons which induced the opening of the market to Canadian stores was the belief that beef would be reduced to the consumer by anything up to 6d. per pound. The above prices do not auger well for a substantial reduction in the price of beef, but it shows the eager demand for the class of cattle Canada is beginning to ship.

LAWN SPRINKLER REQUIREMENTS FOR THE BRISTOL AREA

Acting Trade Commissioner Douglas S. Cole

Bristol, May 1, 1923.—Owing to the rainfall in England being excessive as compared with the very much drier climate of Canada, the demand for lawn sprinklers is very limited for both revolving and wriggler types. The summer of 1921 was, however, exceedingly dry and the demand for sprinklers was fairly good, but as the shortage of water became acute artificial watering was prohibited in most areas. This dry season resulted in dealers stocking heavily in anticipation of similar conditions in the summer of 1922, which was very wet. These dealers were still carrying their stocks last fall.



Whilst the demand is quite limited, that which receives the best sale in the West of England is a small and compact English sprinkler specially suited for small lawns, flower beds, conservatories, etc., which is of brass with nickel-plated head to fit hose $1\frac{1}{2}$-inch, $\frac{5}{8}$-inch, and $\frac{3}{4}$-inch, with tapered connection. This small type of sprinkler has a spike 16 inches long at the bottom which is stuck into the lawn. The manufacturers' price is in the vicinity of 3s. to 4s. (71 cents to 95 cents), dependent upon small variations, the retail trade selling it for approximately 7s. ($1.65). Illustration 1 shows this, the cheapest type.

Next in price is a stationary spray on a stand which does not rotate and which takes the place of a sprinkler ring as we know it in Canada. The English type, as in Illustration 2, is fitted on a cast-iron stand with a brass detachable union to take $\frac{1}{2}$-inch, $\frac{5}{8}$-inch or $\frac{3}{4}$-inch hose. This sprinkler will cover an area of 30 feet to 35 feet in diameter, according to pressure. The height is 7 inches, price for same being but slightly more than for No. 1 type, which is simply stuck in the ground.

Next in cost, and for which the demand is exceedingly limited, is the 8-arm and 4-arm revolving type, as in Illustration 3. This is somewhat different to the Canadian revolving sprinkler. Prices for the 4-arm revolving are about 16s. 6d. each ($3.92), whilst the 8-arm brings about 19s. ($4.51), but the sale of this better type of sprinkler is so limited that it is doubtful whether it would pay Canadian firms to try to manufacture this type.

Exchange is taken at $4.75 to the pound sterling where prices are quoted.

The above information may be useful to Canadian manufacturers, several of whom have written to this office in connection with the sale of their products.

CANNED GOODS MARKET IN BRISTOL AREA

ACTING TRADE COMMISSIONER DOUGLAS S. COLE

Bristol, April 30, 1923.—Pre-war the quantity of canned goods consumed in the Bristol area was most regular, and the large importers could make their requisitions with surety, basing them on the previous year's consumption. This situation is entirely changed, conditions generally being chaotic owing to stocks held by liquidators having been thrown on the market, and the public, owing to fluctuating prices, are erratic in their buying.

The West of England, the Midlands and South Wales form a most important area and Canadian canners would do well to consider all suggestions made by their representatives, who in addition handle canned goods from many other countries. It cannot be emphasized too strongly nor reiterated too often that quality and grading are the predominant requisites of this market. Importers are at all times favourable to Canadian goods (and those from the Dominion and Colonies) in preference to the products of the United States and other foreign countries; and Australia is a strong competitor.

The writer realizes the difficulty that where dozens of canneries are under one control but marketed under the same label, the pack must vary to a certain extent. Several large importers have expressed the opinion that whilst some Canadian packs are excellent, they could never be sure that they were uniform throughout.

When prices are given exchange has been calculated at $4.75 to the pound sterling.

GALLON APPLES BETTER

The market for gallon apples is very quiet at the present time, prices being in the vicinity of 14s. ($3.32) per dozen as compared with 20s. ($4.75) per dozen last year for $6\frac{1}{4}$-pound net tins. The confectionery trade takes a great

portion of the gallon apples, and in view of last year's excellent apple crop in England, the domestic supplies which were put away for the winter have carried the confectioners through quite well to this spring. One detrimental factor to this home crop was that due to wet weather last summer a certain portion have spoiled during the winter. The solid pack is the big demand. Several importers accepted stocks this spring at 19s. ($4.51) before the drop came and are now forced to unload at a substantial loss. For the most part the demand for gallon apples is quiet compared with the larger market in Scotland.

It will be noted that complaint was made last year that cans were being made of too thin a plate, which oftentimes gave the goods the appearance of being "blown" when in reality it was only the weight of the contents bulging out at the ends of the tins and making them appear slack. This objection does not exist at the present time, as all importers questioned in this regard stated that supplies were satisfactory and quite sound in condition. The possibility is that last year's supplies of tinplate may not have been altogether satisfactory.

The Californian solid pack apple is considerably in evidence, but the Canadian pack is quite holding its own.

CANNED RASPBERRIES

Last year, owing to the failure of the English crop, there was a great shortage of raspberries, and a fine opportunity was given to exporters overseas, which unfortunately was not fully made use of. Shipments of raspberries should be of a rich red colour, no stems should be left on the berries, and the lacquering so good as not to peel off the tins.

English canned raspberries are always popular, but the supply does not meet the demand, and Canadian canners have here a fine opportunity if they will but make use of it, by the proper selection of fruit, the attractive labelling of cans, the marking of their product as of British origin, and the guarantee that the pack does not vary.

CANNED PEACHES, PEARS, ETC.

The same difficulty as regards grading is seen with Canadian pears. Some excellent packs are on the market, but by far the greater portion are the small hard Keiffners, which are much smaller than the well-known Bartlett, the latter being the universal demand.

The market for canned peaches is much upset at the present time owing to large quantities of liquidated Australian stocks having been thrown upon the market this spring. These are still on sale at a greatly reduced price, and it is impossible to forecast market tendencies.

The market for canned cherries and plums is limited in so far as Canadian products are concerned.

CANNED PEAS CONTROVERSY

The vexatious question of the quantity of copper sulphate allowed in canned peas has not been settled yet, but it has been taken up by the large wholesalers in Great Britain and it is hoped that a final decision will be arrived at within the next three months. Although contrary to law, ordinarily the small quantity of two grains per pound of peas is permitted, yet certain municipalities take exception to this amount, in which case the retailer is subject to prosecution. This office is informed that the Italian packers will back up the wholesalers and retailers where prosecutions occur although this fact is not generally admitted. On the other hand, most English packers cannot support the retailers, and in fact one large house advertised some time ago in the *Grocers' Gazette* explaining

their position in this regard. According to this firm, the majority of troubles in regard to the presence of sulphate of copper have arisen owing to foreign packed peas containing an unnecessary quantity of this chemical. They state that peas packed with a very small portion of colour are better not only in colour but in flavour than peas packed *au naturel*, and that by using this small proportion of copper sulphate the peas avoid the " peculiar burnt flavour which is entirely unlike the flavour of freshly gathered peas ". The point brought out is that all tins of their peas which are prepared by the copper sulphate process bear notifications of the fact, but that the proportion is exceedingly small and is not injurious to partakers of the peas. At the same time they state they will pack in accordance wih the orders they receive, and although artificially coloured peas cost slightly more than peas *au naturel*, these will be supplied at the same price, but no responsibility will be accepted for sale in districts in which the municipal authorities have given proof of their objection to the sale of the article. This attitude is quite consistent on the part of the English packer, and it puts the matters squarely up to the retailer to this extent that he must specify his preference, and districts affected with a local distaste for coloured peas need not order them.

The other side of the question has been shown in the current numbers of the *Grocer* with a full page advertisement by the largest Canadian exporters of canned goods who have set forth in a terse manner their position. This firm are to be commended for the strong attitude they have adopted, in which they bring out the selling point that Canadian peas are guaranteed to be perfectly natural in flavour and colour, no artificial colouring or other injurious ingredients being used and this fact being placed prominently on the label. The time for advertising this fact has been most opportune.

The price of canned peas varies considerably, and mostly in this local area is a ship's store trade, prices being in the vicinity of 8s. to 9s. ($1.90 to $2.14) per dozen ex store, trade being fairly steady.

CANNED TOMATOES

One importer in this area who last year handled in the vicinity of 6,000 cases of canned tomatoes, states that the Italian is a more solid pack than the Canadian. This, he states, is due to the fact that the Italian plum tomato does not contain as high a percentage of water as the Canadian. Plum tomato seeds were sent by the Canadian Trade Commissioner at Milan to Canadian canners this last year to see what result could be achieved by growing the Italian product. The results of this experiment are not to hand, but if this plan proves feasible it is believed that it will materially increase the sale of Canadian canned tomatoes.

Owing to a bad season last year there has been but little spring business, wholesalers being well stocked and prices remaining steady at approximately the same as last year.

Prices pre-war were approximately 3s. (73 cents) per dozen as compared with to-day's price of from 7s. to 8s. ($1.66 to $1.90). This has materially affected the sale in this area, as large quantities were consumed by the miners in South Wales when they could be bought at from 3d. to 4½d. (6 cents to 9 cents) per tin for 3's. A tin of tomatoes served as a combined edible and drink and enjoyed a great popularity. Owing to the prevailing high price this trade has been largely curtailed.

CANNED LOBSTER DEMAND

Owing to the severity of the past winter, with a subsequent delay in opening the fishing season, there will be no arrivals of new season lobster until the end

of June. Prices are high, due in part to the scarcity through overfishing of the lobster beds, and also in part to fresh lobsters obtaining very high prices. For this reason ¼-lb. tins are the most popular. Japanese crab is a strong competitor due to cheapness and owing to the failure of the early spring pack of lobster. Choice Nova Scotia ½'s are in the vicinity of 190s. ($45.12), but ¼ stocks are very low and difficult to obtain. Japanese crabs ½'s are in the vicinity of 125s. to 127s. ($29.68 to $30.16).

Several firms in this area wish to receive quotations from Canadian packers of canned lobster.

CANNED SALMON CONDITIONS

Consumption of canned salmon at the present time is somewhat below normal. British Columbia Sockeye ½'s are in the vicinity of 68s.. to 70s.2 ($16.15 to $16.63), and owing to the high price some local importers have turned their attention to Red Siberian, which is considerably cheaper. Pink salmon talls are 24s. to 25s. ($5.70 to $5.94); ½'s reach 31s. to 33s. ($7.36 to $7.84). Siberian ½'s are approximately 33s. ($7.84) with talls in the vicinity of 24s. to 25s. ($5.70 to $5.94).

The big demand is for British Columbia Sockeye, and of course cannot be met owing to scarcity and high prices but, as mentioned above, in its absence the public have turned their attention to Red Siberian and Alaska reds. The demand for medium reds is very small.

MARKET FOR CANNED MEATS

The products of the United States, South America, Australia and New Zealand are to be seen in this area, but practically nothing of Canadian origin. To what extent the store cattle trade will affect the sale of canned meats is problematical, but as long as Australian and New Zealand meats are being sold, there is no reason why Canadian goods should not obtain a portion of the trade particularly as the Canadian is a much firmer product in the tin than the Australian and New Zealand. This office will place any inquiries from Canadian sources in the hands of interested importers in this area, particularly for pressed beef.

For last report on canned goods in the Bristol area reference should be made to No. 947 (March 25, 1922).

"MARKET VALUE": NEED FOR AN INTERNATIONAL DEFINITION

The report of the Tariff Committee of the Birmingham (England) Chamber of Commerce recently presented to the Council contained the following: "From time to time this chamber has been asked by a number of its members to interpret the term 'market value.' In the absence of a universal interpretation, the committee recommended that the Customs Conference of the League of Nations should consider the practicability of each country, where Customs duties are levied on an *ad valorem* basis, framing a valuation tariff for its imports, in order to ensure the equitable assessment of the Customs duties as between one importer and another. Alternatively, the committee suggested that the conference should consider the possibility of all countries accepting as 'market value' the 'value of the goods at works.' The committee also suggested that the conference should arrange that steps should be taken to complete a classified list of the commodities of commerce for use by all countries in the framing of their Customs tariff. The committee suggested that in respect of goods delivered in a foreign country where the national refuses delivery for some reason or other, the Government concerned should allow a rebate in order that the goods may be re-exported.

SOUTH AFRICAN MARKET FOR CONDENSED CREAM AND MILKS

Assistant Trade Commissioner J. Cormack

CONDENSED CREAM

Cape Town, April 11, 1923.—Before the war, the only firms supplying the market in South Africa were Nestlés and Fussells. The average annual imports were from 7,000 to 8,000 cases of 48 tins each, and the principal sizes were $5\frac{1}{2}$-ounce and $11\frac{1}{4}$-ounce. The former weight was the better seller in the ratio of about three to one. A larger sized container of about 2 pounds also found favour for sale to confectioners and cafés, and would cost relatively less than the smaller sizes. During the war, however, the market practically ceased on account of the prohibition of manufacture.

In post-war times, three varieties came on to the market, viz: Nestlés, Dads (Norwegian) and Bernese Alps (Swiss), and it is generally conceded that Nestlés import about 90 per cent of the total. The imports of this line for 1923 are expected to total about 4,500 cases, in a similar ratio of size and distribution. This is roughly an increase of 1,000 cases above last year, which was only about one-half of the amount usually imported before the war. It serves to show, however, that the market for cream is coming back. The pre-war retail price was, for the $5\frac{1}{2}$-ounce can, 1s.; and for the $11\frac{1}{4}$-ounce can, 1s. 9d. To-day these prices are 1s. 3d. and 2s. 3d. respectively. An approximate f.o.b. figure will be arrived at by the deduction of 30 per cent from these prices.

In general, canned cream must be absolutely free from preservatives. To ascertain this, there are frequent checkings by the Customs authorities. The percentage of butter fat must be at least 20. In the course of time, when a commodity becomes more or less established, it is put on what is known as the Tariff List. Special care must be taken with all export shipments.

For a good-quality cream there should, in the course of a very short time, be a market in South Africa for anything up to 10,000 cases a year. The season for cream is mostly from September to April, and the market is ready for a good moderately priced cream now. A $5\frac{1}{2}$-ounce tin retailing at 1s. would find a big sale.

MILKS

Dried Milk.—The great difficulty with this commodity in South Africa is to ensure its keeping quality. It readily becomes "tallowy," i.e. the top of the contents of the can takes on a yellow colour and a tallow smell and taste, on contact with the air. This is especially noted when using the larger containers (14 and 28 pounds), whose contents are not always wholly used immediately they are opened. Dried milk unopened does not readily keep in this country for more than six or eight months after manufacture without becoming deteriorated. It is chiefly used in the manufacture of margarine, of which there is very little consumption in South Africa.

This commodity must contain not more than 5 per cent of water, but the only requisite standard of butterfat is that, when diluted, it must comply with the regulations covering fat percentage in ordinary cow's milk, i.e. $8\frac{1}{2}$ per cent of solids, not fat, and 3 per cent of fat.

The experience of the trade in this line, and the difficulties which have been stated, detract from the probability of larger sales; but Lactogen and Glaxo, which are manufactured under special preparation and sold as infants' food, are doing a good business.

Sterilized Milk.—This has a small sale in the Union; there is more demand for it in the hotter climates of the Congo and Portuguese East Africa. The regulations affecting this product are identical to those applicable to ordinary fresh milk.

Skimmed Milk.—The tariff duty of 6d. per pound is so high for this product that it amounts in practice to an embargo. The health authorities are strongly against the introduction of milk of this class, on account of the fear that it might be used for infant feeding by ignorant whites and by the natives. The regulations regarding skimmed milk provide that " skimmed or separated milk shall contain at least eight and four-fifths per cent of milk solids, not fat, and be free from preservatives or other extraneous matter."

Sweetened Condensed Milk.—The annual imports of this product averaged in pre-war days between 350,000 and 400,000 cases containing 48 tins of 14-ounce and 60 of 12-ounce. Nestlés and Milkmaid brands comprised 90 per cent of the total. Prices to the merchant were 19s. to £1 per case. During the war Nestlés alone were able to export, but their sales dropped about 40 per cent. This, however, gave the local manufacturer a chance, and he has been a factor ever since. Prices were good then, 56s. per case to the merchant. Last year about 250,000 cases of milk were imported, Nestlés sending 72,000, and about twenty other firms competing for the balance of the trade. The local factory in Natal produced about 33,000 cases. Prices to-day to the merchant are 31s. (Nestlés), and 26s. to 28s. (other firms).

The regulations affecting sweetened condensed milk read: " Sweetened condensed milk shall contain at least twenty per cent of milk solids, not fat, and at least eight per cent of milk fat, and be free from preservative or other extraneous matter except pure sugar."

There exists to-day a special feature of this trade. In 1918, Nestlés commanded about 90 per cent of it and were so well established as to retain it at a considerably higher figure than any of their competitors. Owing to conditions between 1919 and 1922, their prices reached the high figure of about 10s. per case over those of their competitors, and it was more than the business could stand. In consequence a great deal of it was attracted to other brands, and they had to reduce their prices to arrest the loss of business that had ensued. Market conditions to-day are therefore considerably altered, and no one firm dominates the situation. This should enable Canadian exporters to get a footing, and the opportunity now presented for milk of good keeping quality and at the right price is exceptional. Brands from Australia (Lifeguard) and America (Dairymen's League) are forging ahead; the former during the past six months landed nearly 20,000 cases, and the latter during eight months nearly 30,000 cases. In 1919 these firms were not shipping more than a few hundred cases a year to this market.

Milk Unsweetened.—The pre-war imports here were about 30,000 cases per annum, and the prices were about 2s. per case below sweetened. During the war sales ceased. At the present time sales have only reached about 10,000 a year, and, apart from about 5 per cent of the total, Nestlés Ideal Milk has had the whole market. It is not thought that this figure can be increased greatly, and it would be very difficult to compete against this well-known brand.

The regulations affecting this class of milk read: " Unsweetened condensed milk shall contain at least nineteen per cent of milk solids, not fat, and at least seven and one-half per cent of milk fat, and be free from preservative or other extraneous matter."

The extensive unloading of the Imperial Government's military supplies has now ceased and competition is again normal.

LABELLING REGULATIONS

The principal label of every package containing condensed, dried, pasteurized, sterilized or other variety of milk shall include the words "condensed, dried, pasteurized, sterilized, etc., milk," as the case may be, in bold faced sans serif type at least twelve points face measurement; these words shall be the first of the principal label, and no other words shall be written on the same line. Additionally when the substance has been manufactured from skimmed milk the words "skimmed milk" shall be written diagonally across the principal label in transparent red colour in bold faced sans serif capital type of at least fortyeight points face measurement.

As from the 1st January, 1923, every container in which condensed milk, sweetened condensed milk, condensed skimmed or separated milk, sweetened condensed skimmed or separated milk. dried milk, or dried skimmed or separated milk, is sold by retail shall bear on the principal label directions in one of the following forms:—

(*a*) For condensed milk, sweetened condensed milk and dried milk "To make milk not below the composition of standard milk add (here insert the number of parts) parts of water by volume to (here insert the number of parts) parts by (here insert volume or weight) of the contents of this container;

or

(*b*) For condensed skimmed or separated milk, sweetened condensed skimmed or separated milk, and dried skimmed or separated milk not below the composition of standard skimmed or separated milk add (here insert the number of parts) parts of water by volume to (here insert the number of parts) parts by (here insert volume or weight) of the contents of this container.

It should be specially noted that the *first* word of the label must conform to the regulations.

A point which has always been a source of confusion to exporters, importers, and manufacturers is the dilution clause. To explain this, sections 1 and 2 of the regulations are quoted. They are:—

(*a*) Milk means cows' milk, fresh, clean, and without any addition or abstraction. Condensed or dried milk shall be prepared from milk conforming to this definition.

(*b*) The percentages given are in parts per cent by weight.

Milk, when intended or exposed for sale or sold as milk, shall contain at least eight and one-half per cent of milk solids, not fat, and at least three per cent of milk fat.

The problem always is to find the quantity of water to be added to condensed milk to bring it equal to the ordinary standard cow's milk. The following method of computation is simple, and has been found to be invaluable:—

Take analysis and see what the specific gravity is.

This will show the weight of milk in comparison to 100 pounds of water by volume, viz: if specific gravity is 108, this means that 108 pounds of milk condensed is equal to 100 pounds of water by volume.

It is then necessary to find the fat of the 100 pounds, viz: if the fat per cent is 9, then for 109 pounds it would be 9.72.

Therefore to find the quantity of fat when diluted, take the weight of condensed milk, viz: 108 pounds, and add per dilution say $1\frac{3}{4}$ parts, then if total weight of 283 pounds contains 9.72 pounds fat, what will 100 pounds contain? This is simple proportion, the answer being 3.43 per cent, and proving that the milk fat is slightly more than the requirements for ordinary standard milk.

The same method obtains for other solids.

The new duties, the table of which was published in *Commercial Intelligence Journal* No. 1006, are an increase of 100 per cent, and they are intended as a measure of protection to local interests or as a means of encouragement to the larger overseas factories to begin operations in this country. As far as can be learned, no firm is as yet contemplating a move in this direction, although one at least is investigating conditions. The difficulty of obtaining a sufficient supply of fresh milk within a paying radius from any centre is the chief drawback in connection with manufacture, and the sugar produced locally is not thought to be very satisfactory for this purpose.

It should be specially noted that the keeping quality (without any preservative except sugar) of milks for sale in South Africa must be rigidly maintained, as this has been a bar to the sale of many brands in the past.

VICTORIAN GOVERNMENT'S ELECTRICAL SCHEME

TRADE COMMISSIONER D. H. ROSS

Melbourne, April 18, 1923.—In sequence to the reports from this office, which appeared in previous numbers of the *Commercial Intelligence Journal*, relative to the large quantity of electrical equipment required by the Victorian Government in its scheme for utilizing the brown coal deposits at Morwell for electrical power, Canadian manufacturers are further advised that tenders are now being invited for the manufacture, supply, testing and delivery—in every way complete—of Aluminium Steel Cored Cable.

Particulars of the requirements are briefly outlined thus (the contract not calling for supervision of erection):—

SPECIFICATION No. 23/77

Item 1.—500 miles of aluminium steel cored cable, 0.0707-sq. inch.
Item 2.—Sufficient aluminium jointing sleeves for making the full number of joints, plus 25 per cent spare.
Item 3.—Six (6) complete sets of tongs for making joints.
Item 4.—1,500 pounds of flat aluminium armour wire, 0.3-inch by 0.05-inch.
Item 5.—2,500 pounds aluminium tie wire, 0.232-inch diameter.
Item 6.—200 parallel groove clamps.

DATE OF CLOSING OF TENDERS

Tenders—on the prescribed form—should be addressed as first-class mail matter to the Secretary of the State Electricity Commission of Victoria, 22-32 William Street, Melbourne, Australia, in time to reach their destination before noon on August 31, 1923.

CHARGES FOR SPECIFICATION

The specification covering the requirements, and contract form, may be inspected at, and copies obtained from the Department of Trade and Commerce, Ottawa (refer to file No. 26502).

The Electricity Commission makes a charge of $9.73 for the first three copies of the specification, and for each additional copy a charge of $2.43.

The Department of Trade and Commerce, Ottawa, has been requested to collect these charges before delivering copies of the specification. These charges will ultimately be returned (by instruction of the Electricity Commission) to firms submitting bona fide tenders.

DEPOSITS ON TENDERS PAYABLE IN CANADA

As in the case of previous specifications, to facilitate the interests of Canadian tenderers, the Electricity Commissioners have arranged with the Department of Trade and Commerce, Ottawa, that the amount of the preliminary deposit ($486.67) can be made in Canada. The amount of the deposit is to be paid to the Accountant of the Department of Trade and Commerce, Ottawa, and his official receipt only need be forwarded with the tender to Melbourne.

The elimination of the more circuitous method of deposits being sent to Australia, and possibly being returned to Canada, makes the payment in Canada a convenience alike to the Commission and tenderers.

TRADING POSSIBILITIES IN HOLLAND FOR CANADIAN PRODUCTS

Trade Commissioner Norman D. Johnston

Market for Packing House Products

II

[Former reports in this series which have been published in the "Commercial Intelligence Journal" are as follows: Grain and Feeding Stuffs (No. 982) Flour (No. 984); Dried and Evaporated Apples (No. 991); Canned and Preserved Fruits and Vegetables (No. 992); Canned Fish (No. 993); Demand for Sugar (No. 998); Syrup and Honey (No. 1000); Tinned and Powdered Milk (No. 1006); and the first part of the Report on Packing House Products (No. 1007).]

NEUTRAL LARD

The neutral lard trade has shown considerable expansion during the last three years, and from an import of only 432,884 kg. (952,345 pounds) in 1919 it jumped to 2,099,134 kg. (4,618,095 pounds) in 1920 and 3,001,818 kg. (6,604,000 pounds) in 1921. Last year the importation declined slightly to about 2,561,000 kg. (5,634,200 pounds). The United States, which has been the source of supply for the largest part of the imports, maintained her position last year, and the decrease which took place was largely in South American neutral lard. The imports from the United States amounted to 2,014,222 kg. (4,431,288 pounds) in 1920, 2,896,325 kg. (6,371,915 pounds) in 1921, and about 2,486,000 kg. (5,469,200 pounds) in 1922. These figures are given so that Canadians may know the quantity of trade offering in case they can compete with American firms. Neutral lard is imported mostly in tierces of 170 kg. (374 pounds) net.

COMPOUND LARD

While a fair trade was done in compound lard in 1920, when 1,993,825 kg. (4,386,415 pounds) were imported, this business is not to be compared with that in either pure or neutral lard, and has gradually diminished to insignificant proportions, the imports only amounting to 656,031 kg. (1,443,268 pounds) in 1921 and about 155,000 kg. (341,000 pounds) in 1922. Supplies have been coming from Norway, the United States, Belgium, Great Britain, and South America. There is a small trade to be done in Holland in steam lard for domestic consumption, but more particularly for shipment to Germany.

TALLOW AND TECHNICAL FATS

A good business is done in Holland in tallow and technical fats, and in 1921 these products, including greases and bone fat, were imported to the amount of 17,305,988 kg. (38,073,174 pounds) valued at 8,556,572 fl. ($3,439,-739), of which the United States furnished 13,200,787 kg. (29,041,731 pounds). Quite a large quantity of these commodities is bought at the London auctions, and according to the Netherlands statistical returns 2,148,426 kg. (4,726,537 pounds) were imported from Great Britain in 1921. Australia in that year also did quite a good trade, having exported 837,604 kg. (1,842,729 pounds), making her third on the list, while the Argentine was fourth with 491,310 kg. (1,080,882 pounds). The other suppliers were Germany, Belgium, Uruguay, Norway, Denmark, New Zealand, and France. In 1922 the imports were still larger, reaching to about 22,176,000 kg. (48,787,200 pounds) with a value of 9,646,000 fl. ($3,877,692). The quantity received from the United States—13,647,000 kg. (30,023,400 pounds)—was a little larger than in the previous year, and the imports from Great Britain rose to about 3,793,000 kg. (8,344,600

pounds), those from Argentina to 1,618,000 kg. (3,559,699 pounds), and from Belgium to about 1,508,000 kg. (3,317,600 pounds). Australia, France, and Norway were the other sources of supply in 1922.

Edible tallow must be of high grade, while technical tallow is mostly bought in tierces of 170 kg. (374 pounds) net in different grades according to the colour, standard and quality. The appended table will show the various grades of tallow in demand:—

Grade and Colour	Standard	Free Fatty Acid	Moisture and Impurities
Edible tallow, pure white..	42½ to 43½	½ to 1%	Not over ½ of 1%
Prime tallow almost white, slightly grey..	42½ to 43½	½ to 1%	Not over ½ of 1%
No. 2 tallow, darker than prime..	42 to 43	5 to 8%	0.6 to 0.75%
Brown grease, brown..	No standard.	Not over 25%	Not over 1%

MELTED BEEF FAT (PREMIER JUS OR OLEO STOCK)

Melted beef fat arrives in Holland principally from two sources—the United States and Argentina. From the former it is mostly called beef oleo stock and from the latter beef premier jus. Out of a total importation in 1921 of 11,137,143 kg. (24,501,715 pounds) with a value of 6,671,783 fl. ($2,269,054), the United States supplied 5,988,479 kg. (13,174,654 pounds) and the Argentine 3,380,139 kg. (6,436,306 pounds). Great Britain was the next largest supplier with 1,333,367 kg. (2,933,407 pounds), but it is probable that a considerable part of these imports embodied American, Argentinian, or other beef fat. Belgium, France, Uruguay, Australia, Sweden, and Germany also exported to Holland. In 1922 the United States and Agentina almost equally participated in the trade, the former having furnished 5,014,000 kg. (11,030,800 pounds) and the latter 5,065,000 kg. (11,143,000 pounds) out of a total importation of 13,104,000 kg. (28,828,800 pounds) valued at 6,269,000 fl. ($2,520,140), while Great Britain supplied about 1,970,000 kg. (4,334,000 pounds), the remainder coming largely from Belgium, France, and Uruguay.

This beef fat should be of high quality for consumption. It is imported in tierces of 170 kg. (374 pounds) net, and a popular form of packing is also in tins of 20 kg. (44 pounds), two tins to a case; some imports also arrive in kegs of 1 cwt. (112 pounds).

MELTED MUTTON FAT (PREMIER JUS OR OLEO STOCK)

Melted mutton fat, premier jus or oleo stock—whichever it is called—is not nearly as large a selling article as the beef product. In 1921, which was a big year for mutton fat, 1,136,053 kg. (2,499,317 pounds) valued at 619,177 fl. ($248,911) were imported, of which the United States and Great Britain were the largest suppliers, the former having sent 443,290 kg. (975,238 pounds) and the latter 427,695 kg. (940,929 pounds). Australia also shipped 121,343 kg. (266,955 pounds), and Argentina 108,559 kg. (238,830 pounds), most of the balance coming from Belgium and France. In the years immediately preceding 1921 the imports averaged about 500 metric tons, while last year only about 419 metric tons (418,000 kg. or 921,800 pounds) were imported. It will therefore be seen that while this is not an article which is heavily imported, it is worth consideration. Tierces of 170 kg. (374 pounds) net are the most used form of packing, but the other packages mentioned in reference to melted beef fat are also sent in.

OLEO OIL

Margarine manufacture is a very important industry in Holland, and the sale of the raw product oleo oil has therefore increased rapidly, with the result that the imports of oleo oil have risen rapidly with each year. Imports in 1919

were 1,291,801 kg. (2,841,962 pounds); in 1920, 7,441,018 kg. (16,370,240 pounds); in 1921, 14,230,606 kg. (31,307,333 pounds); and in 1922, 14,700,000 kg. (32,340,000 pounds). Imported oleo oil comes principally from the United States, the other suppliers, insignificant in comparison, being Great Britain, Germany, Argentina, Belgium, France, Norway, and Denmark.

Oleo oil is purchased in three grades, e.g. extra oleo oil, simple oleo oil, and second grade oleo oil. It is packed mostly in tierces of 170 kg. (374 pounds) net.

TINNED MEAT

Quite a nice business has been done and is being done with Dutch firms in tinned meat, particularly for shipment to Germany. The imports into Holland of meat ready for use or in tins, bottles or similar small packing amounted to 1,403,341 kg. (3,087,350 pounds) in 1921, with a value of 1,122,686 fl. ($451,-319.77), and to about 1,436,000 kg. (3,159,200 pounds) in 1922. The Argentine has been the largest source of supply, having exported to Holland 517,520 kg. (1,138,544 pounds) in 1921 and about 702,000 kg. (1,544,400 pounds) last year. The United States has been second with 485,304 kg. (1,067,669 pounds) in the former year and about 360,000 kg. (792,000 pounds) in 1922, while Great Britain has been third with 147,963 kg. (325,519 pounds) in 1921 and 162,000 kg. (356,400 pounds) last year. The other countries supplying have been Belgium, Germany, and France.

The 6-pound tins of corned beef are chiefly in demand. These are to a large extent opened in the shops, and these contents sliced and sold in small quantities.

THE APPOINTMENT OF REPRESENTATIVES

The only way to push energetically the sale of packing house products is to appoint a good firm of commission agents well known in the trade to act as representatives. By being in close touch with the agents by cable, it is possible for them to keep the name of the Canadian firm, their goods and prices, constantly before buyers, while at the same time they can keep the exporter informed of market conditions—a very important point in commodities such as packing house products, on which prices vary so rapidly. Dutch firms are very conservative, and confidence in the agent often leads to confidence in the product. Just as soon as the quality of the article is known to be consistently good, the right agent can often get higher prices and will on many occasions do a business even if the price is higher than that for competitive brands. It is therefore important that care should be taken in the selection of agents, and in this regard the Canadian Trade Commissioner will be glad to give all possible assistance in making the right selection. The usual agent's commission is 2 per cent.

CONSIGNMENTS

Many firms have done very well by sending goods on consignment, but if this kind of business is to be done it should only be engaged in if the Canadian firm is well represented by an established house. If the agent is well acquainted with the trade and is familiar with the signs which will enable him, as far as it is humanly possible, to anticipate market tendencies, a consignment shipment at the right time will bring fine returns, as a better price will be paid for stocks on the spot than for future delivery, especially under uncertain market conditions. Before a consignment business is done care should be taken in the appointment of an agent who knows his business so that consignments may be made at the right time.

SELLING ARRANGEMENTS

Quotations should be sent c.i.f. Rotterdam or Hamburg per 100 kg. or 220 pounds net, including 2 per cent agent's commission. Payment is usually three days' sight draft attached to full set of shipping documents Holland. If consignments are made it will be possible, should this be desired, to make an arrangement with the agent whereby he will advance 60 or 70 per cent of the market value on the day of shipment. Some firms make such an arrangement, while others do not require the agent to make any advance on the consignment. It is a matter of mutual agreement.

If any Canadian producers of packing house products who are not connected in Holland and who would like to develop this market will communicate with the Canadian Trade Commissioner in Rotterdam, giving him an indication of what policy it is desired to pursue, every possible help will be given to get them in touch with the most suitable firm or firms so that advantage may be taken of the business offering in the Netherlands for domestic consumption as well as shipments to other countries.

MARKET CONDITIONS IN THE BRITISH WEST INDIES

L. M. B. MEYERS, OFFICE OF THE TRADE COMMISSIONER

Barbados

Barbados, May 3, 1923.—Stocks in the dry goods trade during the month of April were fairly good, being in anticipation of the good crop season, and as the crop is fairly large and the produce market has been strong—advancing all during the season—the expectations in regard to brisk sales have been realized. Many members of the dry goods trade stated that owing to the lack of Canadian firms sending samples to compare with goods from other countries, comparatively very little business was done in this department of trade. United States firms, on the other hand, are very vigilant in this regard, and when the samples represent saleable lines they invariably get orders for them. The activity in building operations is reflected in increased imports of building materials.

Provision Market.—Stocks of flour, in both family, extras and supers, are in fair supply. The former is quoted at $4.75 to $4.85, extras at $4.20 to $4.50 and supers at $3.50 to $3.75 per half bag of 98 pounds. Cornmeal is also in supply, and is being quoted at $3.10 per half bag of 98 pounds. Codfish is in fair supply, the demand being quiet, and is quoted at large $29 and medium $28 in bond. Split herrings at $5 per barrel, and salmon at $17 to $18 per 200 pounds. In regard to feedstuffs, white oats are being quoted at $5 per bag of 160 pounds, oilmeal at $5 per bag of 125 pounds, and pollard at $1.80 in half bags of 80 pounds. Canadian hay is being quoted at $2.75 per 100 pounds. A recent arrival has been the *Harriet B.* from St. John, N.B., with 3,000,000 extra No. 1 laying shingles, which were sold to arrive at $2.92 per M duty paid, equal to about $1.20 f.o.b., and the market is now heavily stocked with this line.

British Guiana

Business is reported on the whole to be rather slow and confined to the gold and diamond industry. Speculators are fitting out expeditions to the interior, and it is stated that these two industries are for the moment the only ones which are keeping business moving.

The commodity market is reported to be generally well stocked. Potatoes, however, are scarce. The following are recent wholesale prices for items under this head: potatoes, $5 per bag; flour, $9.50 per bag; beef, $30 per barrel;

onions, $10 per crate of 50 pounds; biscuits, $6 per barrel; rice, $6 per barrel. Cottons and prints are selling well, with stocks rather on the heavy side. Supplies of tweeds, boots and shoes are on the decline, and sales are fairly brisk.

Trinidad

The figures giving the imports into the colony from January 1 to March 31 have just been published by the Chamber of Commerce. These show that the majority of the import of salted beef was from the United States. All the beer landed during the period, amounting to 2,450 barrels, came from Europe. The figures include 9,670 barrels of cement; 3,393 casks and 3,415 boxes of codfish. the major portion of which came from Canada; 77,985 bags and 5,245 half bags of flour from the United States and Canada. Lumber was imported to the extent of 92,284 feet from Canada and 2,695,092 feet from the United States. Oilmeal imported amounted to 7,772 bags; oats, 9,535 bags; cornmeal, 1,869 bags; and pork stuffs totalled 120 tierces, 2,029 barrels and 40 half barrels.

THE MARKET FOR FRESH APPLES IN CHINA

Trade Commissioner J. W. Ross

Shanghai, April 17, 1923.—China produces in Shantung Province a small quantity of apples of early varieties, from trees originally imported from the United States by missionaries, which are mostly consumed locally. The crop has therefore no effect on the import trade as it has no keeping qualities. There are unfortunately no special returns of imports of apples into China; these are included under the general heading of fresh fruits. Japan, the United States and Canada are practically the only sources of supply; scarcely any now come from Australia.

There is a customs duty of 50 tael cents (about 35 cents Canadian currency) per picul at 133⅓ pounds. The only other charges are customs brokerage, etc. If delivery is taken at once—which is the usual practice—there are no dock charges.

There are no pure food laws in China, consequently there is no inspection or restrictions on importations.

Apples for China must be sent in boxes of the ordinary standard type, never in barrels. Each box should be stamped or labelled with the name of the shipping firm or individual and marked "PRODUCT OF CANADA."

Apples—like nearly all other merchandise—are sold on the usual documentary letter of credit payable at sight of documents and arrival of the goods. Prices are quoted c.i.f. Shanghai or f.o.b. Vancouver. Nearly all imported apples are entered at Shanghai, from which point they are distributed by dealers to some of the outports, but few get very far into the interior.

The season for the apple trade in China is rather short, only extending from November to the end of February, after which the fruit lose their firmness and good appearance.

Firms importing apples into China are few in number, and this is a condition which this office is endeavouring to overcome. The present position is that only three or four firms are importing Canadian apples into Shanghai, and these few distribute the fruit to the numerous small dealers and fruit shops and to the outports. This state of affairs might be overcome and more apples sold if Canadian shippers would pay a small commission to an agent or agents to sell the fruit. A commission of even 10 cents per box would be an inducement to agents to place the apples among a number of dealers who would in this way be saved the middleman's extra charges, and the fruit would reach the consumer

at a lower price than is the case at present. A certain quantity of Canadian apples will always be imported, as has been the case for a number of years, but in order to increase the sales and consumption of the fruit, shippers will need to adopt some such method as is outlined above. It is becoming more evident every year that in this market very few goods will sell themselves, and in the case of apples as with everything else some method of calling attention to what one has to sell is very necessary. The names of apple importers in Shanghai and Hongkong are on file at the Department of Trade and Commerce, Ottawa, and may be obtained on application to the Director, Commercial Intelligence Service (quoting file No. 26348.)

Apples packed for shipment to China should not be too large in size. Freight charges being high, apples are never cheap in this market, and large apples with few in a box always appears to be dear. The apples which compete with those from Canada are mostly Wenatchie and Hood River apples from Washington State and Oregon. Such apples are not so fine in quality as the Canadian, but they are considerably cheaper, and therefore meet with a larger demand.

THE CUBAN MARKET FOR CERTAIN CANADIAN PRODUCTS

J. L. Gonzalez-Hoyuela, Office of the Canadian Trade Commissioner

Havana, April 30, 1923.—*Codfish.*—Lately there have been reduced importations and restricted sales of codfish. Stocks held are large and sales have been made below cost. There was an excess of importation during Lent and a considerable surplus was left over from that period. Consignments of Norwegian codfish continue to reach this market; a direct steamer entered the port of Havana a few days ago brought some 4,000 cases. Norwegian "new catch" is quoted at $10 c.i.f. per case, and Halifax at $7.75 direct steamer. Norwegian is being sold here at from $11 to $11.50 per case delivered, and Halifax at from $8.50 to $9.

Potatoes.—The local market is quiet but steady, trade selling at from $4.75 to $5 per bag of 180 pounds delivered. European arrivals are light. The present stock of potatoes in Havana is placed at from 10,000 to 12,000 bundles. A better tone is anticipated, unless European arrivals increase.

Wheat Flour.—There is a sharp local competition among importers of flour. Canadian first patent spring wheat is being sold at $7 c.i.f., while the similar grade of American flour is quoted up to $7.70. Flour imports into this market were rather excessive last month, and a decrease is expected in the immediate future.

LOSS ON AUSTRALIAN APPLES

In a recent speech in London, Mr. A. H. Ashbolt, Agent-General for Tasmania, declared that the cost of delivering apples from the time that they reached the packing sheds in Tasmania until they were sold in Covent Garden, worked out at 9s. 3d. or 9s. 4½d. a case, says the London *Times Trade Supplement.* This was on the basis of a freight of 5s. a case, which has since been reduced by the Commonwealth Government Line to 4s., and by the shipping companies to 4s. 6d. a case. We are informed that at a recent sale at Liverpool the average price of 2,500 cases of Tasmanian apples was 8s. 6d., that sales were subsequently effected at 7s. 6d., and that the average price realized to date has been about 8s. a case. The price named by Mr. Ashbolt allowed nothing to the growers, so that the wholesale price realized represents a considerable loss to them.

TARIFF CHANGES AND CUSTOMS REGULATIONS

Certificate of Origin Under Irish Free State Tariff

With reference to the certificate of origin required by the Irish Free State for goods to be entered under the British preferential tariff, Mr. G. B. Johnson, Canadian Trade Commissioner in Glasgow, advises that the British form is accepted at present. The form required by Great Britain is that set forth in Notice No. 27A of the London Custom House, and which was published in *Weekly Bulletin* No. 869 (September 27, 1920).

Amendment to Dominica Trade and Revenue Act

Trade Commissioner E. H. S. Flood

Barbados, April 23, 1923.—The Trade and Revenue Act, 1894, Amendment Ordinance, 1921, of Dominica has been further amended by an Amendment Ordinance of 1923, No. 8 of 1923, which went into effect on the 14th of March last. Section 2 of the 1921 Ordinance repeals section 17 of the original or 1894 Act, and substitutes a new section therefor. This section deals with the mode of ascertaining and assessing ad valorem duties. The new ordinance amends subsection (1) (a) of section 2 of the 1921 ordinance and also subsection (6) of section 2 of that ordinance.

Section 2 of the 1921 ordinance reads as follows:—

In all cases where the duty payable upon any goods is chargeable ad valorem duty, the importer shall at the time of entering the goods—

(*a*) produce to the Treasurer the invoice thereof, or if he has no invoice
(*b*) make and sign on the bill of entry a declaration to the best of his knowledge, of the market value or wholesale price of such goods at the time of exportation to this Presidency in the principal markets of the country whence such goods were imported and of the reasons why he is unable to produce such invoice.

The amending ordinance declares that subsection (1) (a) shall read as follows:—

(*a*) produce to the Treasurer the invoice thereof, *which shall be made out in the currency of the country whence the goods were imported, if invoices in such currency are obtainable*, or if he has no invoice. . . .

Subsection (6) of section 2 of 1921 reads as follows:—

For the purpose of assessing the amount of the ad valorem duty payable on any goods, the price or value thereof, ascertained as aforesaid, shall be converted into Dominica currency at the market rate of exchange on the day on which the duty is paid, or on the day of arrival of the importing ship, at the election of the Treasurer.

Section 3 of the 1923 Ordinance declares that the words "or on the day of arrival of the importing ship, at the election of the Treasurer," shall be deleted from the section.

Tax on Commercial Travellers in British Guiana

Mr. E. H. S. Flood, Canadian Trade Commissioner in Barbados, writes under date of April 19, 1923, that an amendment has been made to the British Guiana Tax Ordinance, in regard to the taxation on commercial travellers which was reported in *Commercial Intelligence Journal* No. 990 (January 20, 1923). The amendment provides that any commercial traveller who shall commence business in the colony at any time between the 31st day of January and the 31st day of December, 1923, *shall within twenty-four hours of commencing business* register his name at the Chief Commissary and shall take out a license and pay for the same the sum of $48. In the original ordinance the time specified for taking out the license was *within seven days*.

Investigations by the United States Tariff Commission

Mr. F. H. Palmer, Assistant Trade Commissioner in the United States, writes under date May 14 that under the provisions of section 315 (see *Commercial Intelligence Journal* No. 1004: April 28, 1923, page 692) of the Tariff Act of 1922, Mr. McKenzie Moss, Assistant Secretary of the Treasury, has published notices of investigations to be made respecting: linseed or flaxseed oil; synthetic phenolic resin; smokers' articles made from synthetic phenolic resin; phenol; cresylic acid; briardwood pipes; print rollers; taximeters; cast polished plate glass.

United States Imposes Dumping Duty on Calcium Carbide Imported from Quebec

Mr. M. M. Mahoney, Representative at Washington of the Canadian Department of External Affairs, advises that under date of May 16, the United States Treasury Department issued finding of dumping in the case of calcium carbide imported from the Province of Quebec, Canada. The finding reads as follows: "After due consideration I find that the industry of calcium carbide in the United States is being or is likely to be injured by reason of the importation into the United States of calcium carbide imported from the Province of Quebec, Canada, and that such merchandise is sold or is likely to be sold in the United States at less than its fair value."

Argentine Parcel Post Regulations

According to advice received from Mr. A. T. Bollini, Ottawa, Consul General for the Argentine Republic, it is not obligatory to have parcel post receipts legalized in the case of goods sent by parcel post to Argentina. It is pointed out that the sender may have these receipts legalized but that there is no regulation requiring him to do so.

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain.	†*Berengaria*	New York	June 5
" " "	-*Minnedosa*	Montreal	" 6
" " "	†*Paris*	New York	" 6
" " "	*Montrose*	Montreal	" 8
" " "	*Empress of Scotland*	Quebec	" 9
" " "	*Regina*	Montreal	" 9
" " "	†*Aquitania*	New York	" 12
" " "	†*France*	New York	" 13
" " "	*Megantic*	Montreal	" 16
Ireland only	‡*Metagama*	Montreal	" 7
Union of South Africa	**New Brighton*	Montreal	" 15
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela	*Chignecto*	Halifax	" 8
St. Kitts, Antigua, Barbados, Trinidad, Demerara	**Can. Runner*	Montreal	" 13
Bermuda, Bahamas, Jamaica, Colombia, British Honduras	**Can. Forester*	Montreal	" 14
Cuba, Jamaica and Colombia	**Otter*	Halifax	" 9
China and Japan	*President Grant*	Victoria	" 7
" "	*Empress of Asia*	Vancouver	" 14
Australia and New Zealand	‡*Maunganui*	San Francisco	" 15
Australia only	*Sonoma*	Vancouver	" 26

† Letter mail only. * Parcel Post and specially addressed correspondence only.

‡ Letter and Paper mail only. - Papers, Parcel Post and specially addressed correspondence only.

TENDERS INVITED

New Zealand

Copies of plans and specifications have been received from Mr. W. A. Beddoe, Canadian Trade Commissioner at Auckland, for equipment for the Public Works Department, Wellington, and the Post and Telegraph Department, Wellington. These specifications—which include girder spans; steel window sashes and doors; high-frequency oscillator; portable motor-driven air compressor; metering equipment; and 1,000 reams of paper 13-inch by 8½-inch azure wove bond, for typing 3¾ pounds to ream—are open for inspection at the Department of Trade and Commerce, Ottawa. Tenders should be addressed to the Secretary, Public Works Supplies and Tenders Committee, Wellington; and the Stores Manager, Post and Telegraph Department, Wellington, in accordance with these specifications.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING MAY 22, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement of the nominal closing quotations for all the principal exchanges for the week ending May 22, 1923. Those for the week ending May 15 are also given for the sake of comparison.

		Parity	Week ending May 15, 1923	Week ending May 22, 1923
Britain.. .. ..£	1.00	$4.86	$4.7234	$4.7323
France.. .. ..Fr.	1.	.193	.0681	.0680
Italy.. .. ..Lire.	1.	.193	.0498	.0492
Holland.. .. ..Florin.	1.	.402	.3992	.4002
Belgium.. .. ..Fr.	1.	.193	.0588	.0586
Spain.. .. ..Pes.	1.	.193	.1554	.1560
Portugal.. .. ..Esc.	1.	1.08	.0459	.0485
Switzerland.. .. ..Fr.	1.	.193	.1843	.1848
Germany.. .. ..Mk.	1.	.238	.000022	.000018
Greece.. .. ..Dr.	1.	.193	.0183	.0204
Norway.. .. ..Kr.	1.	.268	.1669	.1659
Sweden.. .. ..Kr.	1.	.268	.2720	.2730
Denmark.. .. ..Kr.	1.	.268	.1920	.1896
Japan.. .. ..Yen	1.	.498	.4999	.5016
India.. .. ..R.	1.	2s.	.3188	.3191
United States.. .. ..$	1.	$1.00	1.0203	1.0212
Mexico.. .. ..$	1.	.498	.4961	.4965
Argentina.. .. ..Pes.	1.	.424	.3685	.3689
Brazil.. .. ..Mil.	1.	.324	.1061	.1072
Roumania.. .. ..Lei	1.	.198	.....	.....
Jamaica.. .. ..£	1.	4.86	4.7355	4.7462
British Guiana.. .. ..$	1.	1.		
Barbados.. .. ..$	1.	1.		
Trinidad.. .. ..$	1.	1.		
Dominica.. .. ..$	1.	1.		
Grenada.. .. ..$	1.	1.	.9807—.9814	.9829—.9835
St. Kitts.. .. ..$	1.	1.		
St. Lucia.. .. ..$	1.	1.		
St. Vincent.... .. ..$	1.	1.		
Tobago.. .. ..$	1.	1.		
Shanghai, China.. .. ..Tael	1.	.708	.7677	.7697
Batavia, Java.. .. ..Guilder	1.	.402	.3928	.3906
Singapore, Straits Settlements...$	1.	.567	.5573	.5591

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Quebec, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1648. Whisky; Foodstuffs.—A commission merchant in Havana, Cuba, wishes to obtain the representation for the Cuban market of a good, established Canadian brand of whisky. He is also interested in foodstuffs.

1649. Cornflour.—A firm in the Bristol area desire quotations and samples of maize starch flour—"cornflour".

1650. Glucose Chips.—A Birmingham firm desire samples and quotations of glucose chips, "corn sugar," in 10-ton lots for use in the brewing trade.

Miscellaneous

1651. Oils.—A Birmingham merchant chemical house are open to receive quotations for essential, lubricating, paint and vegetable oils.

1652. Paraffin Wax.—Quotations on 5-ton lots are desired by a Birmingham firm.

1653. Heavy Chemicals.—A Birmingham broker who deals extensively in heavy chemicals desires quotations from Canadian companies. This firm are prepared to pay up to 50 per cent of the value on consignment business.

1654. Chemicals.—Quotations will be received by a firm in the Birmingham area for the following chemicals: (*a*) calcium carbide with gas yield which must be in accordance with the British Welding Association's formulae. (This firm use 1,000 tons per year.) (*b*) laundry blue in 20- to 50-ton lots; (*c*) ammonium sulphate; (*d*) chemicals for paints, pigments and varnishes; (*c*) naphtha and naphthalene (consumption per year 2,000 to 5,000 gallons).

1655. Food Products, etc.—A responsible French firm desire to secure the agency of a Canadian exporter of food products, candies and chocolates, soaps and dyes.

1656. Freezers.—A Birmingham importer desires quotations on 1, 2 and 4 quart sizes of vacuum and hand-crank types of ice cream freezers.

1657. Watches and Clocks.—A Glasgow importer desires to buy outright from a Canadian manufacturer gentlemen's and ladies' gold-filled watches and watch cases; also alarm clocks with plain and luminous dials.

1658. Hats.—A prominent retail and wholesale dealer in men's hats, with factory and retail store in Mexico City, desires to secure an agency for a Canadian manufacturer of men's headgear. References exchanged.

1659. Builders' Hardware.—The resident Birmingham buying agent for an association of Finnish wholesale hardware firms desires catalogues and prices for general builders' hardware, including locks, screws, hand saws, etc.

1660. Cement.—A commission merchant established in Havana, Cuba, wishes to obtain the representation for the Cuban market of a good Canadian cement company.

1661. Steel Wheelbarrows.—A firm in Buenos Aires are in the market for steel wheelbarrows. An excellent market if in price.

1662. White Slats for Pencils.—A firm in Hamburg, Germany, require samples and quotations from Canadian firms for white slats to be used for making pencils. Sizes, when fully seasoned 5½ mm. thick and 185 mm. in length, in widths of 62, 55, 46, 37, 28, and 19 mm., but 70 per cent to be in widths of 62 and 55 mm.

1663. Flax.—Large Belgian importer of flax wishes to receive offers from good Canadian firms.

1664. Foodstuffs and General Merchandise.—A general importer and commission agent in Belize, British Honduras, is desirous of hearing from Canadian exporters of the following lines, with a view to representation: cotton goods; ribbons; table oil-cloth; chinaware; crockery; glassware; stationery; and school supplies, including slates and slate pencils (pure slate not soapstone) paper and paper bags, etc.; sugar; canned and bottled goods—including canned butter; toilet goods; brooms and brushes; enamelled and galvanized ware; oil stoves—from individual type to kitchen class; denatured alcohol in fifty-gallon containers; shoe polishes; blue mottled soap; basket ware, particularly of the low priced market kind; tennis shoes.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From Montreal

To Avonmouth.—Parthenia, Anchor-Donaldson Line, June 2; Michigan, White Star-Dominion Line, June 2; Cabotia, Anchor-Donaldson Line, June 9.

To Liverpool.—Coracero, Cunard Line, June 1; Montcalm, Canadian Pacific Steamships, Ltd., June 1; Canada, White Star-Dominion Line, June 2; Montrose, Canadian Pacific Steamships, Ltd., June 8; Lakonia, Cunard Line, June 8; Regina, White Star-Dominion Line, June 9.

To London.—Lord Dufferin, I.C. Transports, Ltd., May 28; Marglen, Canadian Pacific Steamships, Ltd., June 2; Antonia, Cunard Line, June 2; Canadian Planter, Canadian Government Merchant Marine, Ltd., June 6; Brant County, I.C. Transports, Ltd., June 8.

To London and Antwerp.—Canadian Planter, June 6; Canadian Conqueror, June 20—both of the Canadian Government Merchant Marine; Lord Dufferin, I.C. Transports, Ltd., May 28.

To Southampton.—Empress of Britain, Canadian Pacific Steamships, Ltd., May 28; Marglen, Canadian Pacific Steamships, Ltd., June 2; Minnedosa, Canadian Pacific Steamships, Ltd., June 6.

To Manchester.—Manchester Brigade, May 31; Manchester Hero, June 7—both of the Manchester Lines, Ltd.

To Cardiff and Swansea.—Canadian Explorer, June 1; Canadian Leader, June 15; Canadian Challenger, June 29—all of the Canadian Government Merchant Marine.

To Newcastle and Leith.—Cairngowan, Thomson Line, June 1.

To Dundee and Hull.—Wyncote, Furness-Withy Line, June 5.

To Glasgow.—Marloch, Canadian Pacific Steamships, Ltd., May 31; Gracia, Anchor-Donaldson Line, June 1; Metagama, Canadian Pacific Steamships, Ltd., June 7; Athenia, Anchor-Donaldson Line, June 8.

To Belfast.—Torr Head, Head Line, May 31.

To Cork.—Carrigan Head, Head Line, May 31.

To Havre.—Brant County, I.C. Transports, Ltd., June 8.

To Antwerp.—Brecon, Canadian Pacific Steamships, Ltd., May 30; Minnedosa, Canadian Pacific Steamships, Ltd., June 6; Canadian Planter, Canadian Government Merchant Marine, Ltd., June 6.

To Rotterdam.—Lisgar County, I.C. Transports, Ltd., June 9.

To Rotterdam and Hamburg.—Kenbane Head, Head Line, May 30.

To Hamburg.—Kenbane Head, Head Line, May 30; Lisgar County, I.C. Transports, Ltd., June 9.

To Norwegian Ports.—Fordefjord, Norwegian-American Line, June 15.

To Copenhagen.—Arkansas, Scandinavian-American Line, about June 20.

To Copenhagen, Gothenburg, Christiania, Helsingfors and Other Scandinavian and Baltic Ports.—Aledo, Sprague Lines, June 15.

To St. John's (Nfld.), via Charlottetown.—Canadian Sapper, Canadian Government Merchant Marine, May 31 and June 21.

To St. John's (Nfld.).—Canadian Sapper, Canadian Government Merchant Marine, May 26, and fortnightly sailings.

To New Zealand and Australia.—Doonholm, New Zealand Steamship Co., June 10; Canadian Cruiser, Canadian Government Merchant Marine, June 26.

To South American Ports: Rio de Janeiro, Santos, Montevideo, and Buenos Aires.—Hesperia, May 30; Hilarius, June 20—both of the Houston Lines.

To Bermuda, Barbados, Trinidad and Demerara.—Bedwyn, Canadian Pacific Steamships, Ltd., June 9—via Sydney, N.S.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—Canadian Forester, Canadian Government Merchant Marine, June 14.

To St. Kitts, Antigua, Barbados, Trinidad and Demerara.—Canadian Otter, May 30; Canadian Runner, June 13; Canadian Squatter, June 27—all of the Canadian Government Merchant Marine.

From Quebec

To Liverpool.—Canada, June 2; Regina, June 9—both of the White Star-Dominion Line.

To Hamburg.—Empress of Scotland, Canadian Pacific Steamships, Ltd., June 9.

From North Sydney, N.S.

To Newfoundland.—Kyle, Newfoundland Government Railway Commission, tri-weekly (Tuesday, Thursday and Saturday).

To St. John's, Nfld. (via Charlottetown, P.E.I.).—Canadian Sapper, Canadian Government Merchant Marine, May 31 and June 21.

From Halifax

To Bermuda, St. Kitts, Antigua, Montserrat, Dominica, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad and British Guiana.—Royal Mail Steam Packet Co., May 25, and every fortnight.

From Vancouver

To Liverpool, London, Rotterdam and Antwerp.—Loch Goil, Royal Mail Steam Packet Co., late June, early July.

To Manchester (via Panama Canal).—Howick Hall, Manchester Lines, Ltd., June 6.

To Rotterdam, London and Antwerp.—Drechtydyk, Royal Mail Steam Packet Co., first half of June.

To Rotterdam, Amsterdam, London, Liverpool, Glasgow, Antwerp and Hamburg.—Loch Katrine, joint service of Holland-American Line and the Royal Mail Steam Packet Co., June 7—via Panama Canal.

To Auckland, Sydney, Melbourne and Adelaide.—Canadian Scottish, Canadian Government Merchant Marine, June 20.

To Auckland, Melbourne and Sydney.—Wairuna, Canadian-Australasian Royal Mail Line, July 14.

To Honolulu, Suva, Auckland and Sydney.—Niagara, Canadian-Australasian Royal Mail Line, June 1; Makura, Canadian-Australasian Royal Mail Line, June 29.

To Wellington, Melbourne, Adelaide and Sydney.—Waiotapu, Canadian-Australasian Royal Mail Line, June 3.

To India.—Canadian Winner, Canadian Government Merchant Marine, June 20.

To Kobe, Shanghai, Hong Kong and Manila.—Grace Dollar, Canadian Robert Dollar Co., June 10.

To Yokohama, Kobe, Moji, Shanghai and Manila.—Manila Maru, Empire Shipping Co., June 6.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Australia, Canadian Pacific Steamships, Ltd., May 31; Empress of Canada, Canadian Pacific Steamships, Ltd., June 28.

To Yokohama, Kobe, Moji and Shanghai.—Manila Maru, Osaka Shosen Kaisha, June 6.

To Yokohama, Kobe, Moji, Dairen, Shanghai and Hong Kong.—Arizona Maru, Osaka Shosen Kaisha, May 21; Africa Maru, Empire Shipping Co., June 12.

To Yokohama, Kobe, Moji, Shanghai, Hong Kong (also calls at Dairen, Manchuria). —Africa Maru, Osaka Shosen Kaisha, June 12.

To Yokohama, Kobe, Hong Kong and Manila.—Protesilaus, Blue Funnel Line, June 14; Achilles, Blue Funnel Line, July 12.

To Yokohama and Kobe.—Toyooka Maru, Nippon Yusen Kaisha, May 31; Toyama Maru, Nippon Yusen Kaisha, June 22; Hakata Maru, Nippon Yusen Kaisha, July 13.

To Yokohama, Kobe, Shanghai and Bombay.—Canadian Prospector, Canadian Government Merchant Marine, May 30; Canadian Winner, Canadian Government Merchant Marine, June 20; Canadian Transporter, Canadian Government Merchant Marine, June 30.

From Victoria

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Australia, Canadian Pacific Steamships, Ltd., May 31.

To Honolulu, Suva, Auckland and Sydney.—Niagara, June 2; Makura, June 30—both of the Canadian-Australasian Royal Mail Line.

To Manila (via Oriental Ports).—Admiral, Pacific Steamship Company, every twelve days, May 2, etc.

To Yokohama, Kobe, Shanghai, Hong Kong and Manila.—President Grant, Admiral Oriental Line, June 7; President Madison, Admiral Oriental Line, June 17; Empress of Canada, Canadian Pacific Steamships, Ltd., June 28.

To Yokohama, Kobe, Moji, Dairen, Shanghai, Manila and Hong Kong.—Arabia Maru, Osaka Shosen Kaisha, May 22.

To Yokohama, Kobe, Moji, Dairen, Shanghai and Hong Kong.—Africa Maru, Osaka Shosen Kaisha, June 22.

To Yokohama, Kobe, Moji, Shanghai and Manila.—Manila Maru, Osaka Shosen Kaisha, June 16.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Kaga Maru, Nippon Yusen Kaisha, June 12; Empress of Asia, Canadian Pacific Steamships, Ltd., June 14; Iyo Maru, Nippon Yusen Kaisha, June 30; Shidzuoka Maru, Nippon Yusen Kaisha, July 16.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Kaga Maru, June 12; Iyo Maru, June 30—both of the Nippon Yusen Kaisha.

To Yokohama, Kobe, Moji, Dairen, Shanghai and Hong Kong.—Arizona Maru, Osaka Shosen Kaisha, May 29.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

Lucien Pacaud, Secretary to the Office of the High Commissioner for Canada in London, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada, and Newfoundland, 285 Beaver Hall Hill, Montreal, Que. Telegraphic address: "Britcom."

The British Trade Commissioner (for Ontario), 24 Adelaide St. West, Toronto, Ont. Telegraphic address: "Toroncom."

The British Trade Commissioner (for British Columbia), 210 Winch Bldg., Vancouver. Telegraphic address: "Vancom."

The Officer-in-Charge, British Trade Commissioner's Office, 703 Union Bank Bldg., Winnipeg. Telegraphic address: "Wincom."

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address Canadian.*

Australia

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil

E. L. McColl. Address for letters—Caixa Postal 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China

J. W. Ross. Address for letters—P.O. Box 300. Office—Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba

Address: 400 and 401 Teniente Rey 11, Havana. (Post Office Box 1290.) *Cable Address, Cantracom.*

France

Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland

Norman D. Johnston, Zuidblaak 26, Rotterdam, *Cable Address, Watermill.*

India and Ceylon

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan

A. E. Bryan, P.O. Box 109 ; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico

C. Noel Wilde. Address for letters, Apartado Num. 126 bis, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian.*

New Zealand

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements

A. B. Muddiman, P.O. Box 121, Singapore. (Territory covers Straits Settlements. British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

Douglas S. Cole, Acting Trade Commissioner, Sun Building, Clare street, Bristol. *Cable Address, Canadian.*

Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States

Frederic Hudd, 44 Whitehall street, New York City. *Cable Address, Cantracom.*

Trade Commissioner P. W. Ward, formerly of Singapore, is at present temporarily attached to headquarters at Ottawa.

CANADIAN COMMERCIAL AGENTS

Australia

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark

C. E. Sontum, Grubbegd, N. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

Vol. XXVIII — June 2, 1923 — No. 1009

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

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814.

TABLE OF CONTENTS

Commercial Intelligence Journal

Issued Every Saturday by the Department of Trade and Commerce

Ottawa June 2, 1923 No. 1009

BRITISH EMPIRE EXHIBITION: NOTICE TO FOOD EXPORTERS

As already announced in the *Commercial Intelligence Journal*, plans for Canada's participation in the British Empire Exhibition to be held in Wembly Park, near London, England, from April 20 to October 31 next year, are practically completed.

Canada expects to have an exhibition worthy of its name. The Canadian Government exhibit will be under the direction of the Minister of Trade and Commerce, who for this purpose will have under his jurisdiction the staff of the Dominion Government Exhibition Commissioner.

This department therefore desires, as a preliminary announcement, to state that within the grounds of Wembly Park, where the great exhibition is to be held, will be constructed the Canadian Building. The Empire Exhibition Executive will also construct a special building to be used as a restaurant, in which products of the Empire only will be used, provided they can compete successfully in quality and price with similar foreign commodities.

It is anticipated that the exhibition will be visited by millions of people and a unique opportunity will thus be afforded for manufacturers and producers of foodstuffs throughout the Empire to advertise their products to the world.

Arrangements have not yet advanced sufficiently to permit of any detailed announcement, but it is desirable that it should be known among Canadian exporters of foodstuffs that the Department of Trade and Commerce is prepared in every possible way to assist Canadian suppliers of foodstuffs throughout the period of the exhibition. For this purpose it is suggested that firms interested, and who are not now represented in London or elsewhere in the United Kingdom, should arrange to appoint agents in London, to whom all information can be provided so that on short notice during the period of the exhibition prices and supplies can be made available. The department desires to make a special appeal, in view of the importance of the exhibition, to firms who supply foodstuffs, to supply only the best grade of products. Active steps are being taken in the other Overseas Dominions to win first place for their various products, and the keenest competition may be anticipated.

The Department of Trade and Commerce will provide a special officer detailed in London who will act as liaison officer between Canadian suppliers of foodstuffs and the authorities in charge of the restaurant.

Canadian firms, therefore, interested in supplying Canadian goods to the exhibition authorities, should communicate with The Deputy Minister, Department of Trade and Commerce, Ottawa, giving the names and addresses of their agents or jobbers in the United Kingdom and full information regarding the foodstuffs they can supply, so that arrangements may be made well in advance. The department will also welcome helpful suggestions.

TRADE COMMISSIONER J. E. RAY'S ITINERARY IN CANADA

Mr. J. E. Ray, Canadian Trade Commissioner, Manchester, is now in Canada, and the itinerary for his business tour in the Maritime Provinces and Quebec has been arranged as follows:—

St. John	May 31–June 2
St. Stephen, N.B.	June 5
Chatham	June 6
Halifax	June 7–9
Windsor, N.S.	June 11
Quebec	June 13–15
Montreal	June 18–27
Ottawa	June 28–30

Firms in Montreal who desire to be brought in touch with Mr. Ray, or to interview him, should direct their communications to the Secretary of the Canadian Manufacturers' Association or to the Secretary of the Board of Trade in that city, who have been asked to make appointments for him. In the case of all other cities and towns included in the itinerary requests for interviews should be addressed to the Secretary of the local Chamber of Commerce or Board of Trade.

Mr. Ray will undertake a tour in Ontario commencing the first week in July, the itinerary for which will be announced in due course.

SUMMARY OF THE TRADE OF CANADA FOR APRIL, 1923

The summary of the trade of Canada for April, 1923, shows that as represented in dollars, imports for consumption were valued at $68,181,320 in April, 1923, as against $47,695,454 in April, 1922, and $65,310,847 in April, 1921. The imports from the United Kingdom in April, 1923, were valued at $11,648,372, as against $7,743,386 in April, 1922, and $13,519,887 in April, 1921. The imports from the United States in April, 1923, were valued at $46,927,152 as against $32,869,246 in April, 1922, and $41,558,980 in April, 1921. The total imports for the twelve months ending April, 1923, were valued at $822,950,909, as against $730,188,939 for the corresponding period in 1921-22, and $1,207,178,994 for the twelve months ending April, 1921.

The value of the exports of Canadian produce for the month of April, 1923, was $53,642,251, as against $31,917,500 for April, 1922, and $43,280,735 for April, 1921. The exports to the United Kingdom were valued at $13,607,856 in April, 1923, as compared with $7,626,035 in April, 1922, and $12,432,223 in April, 1921. The exports to the United States were valued at $25,944,331 during April, 1923, as against $15,498,808 in April, 1922, and $22,974,951 in the corresponding month of 1921. The value of the total exports of Canadian produce during the twelve months ending April, 1923, was $953,176,194, as against $728,877,445 for the corresponding period in 1921-22, and $1,179,088,050 for the twelve months ending April, 1921.

The month's returns show an unfavourable balance of trade of $14,539,069; the returns for the twelve months' period show a favourable balance of $130,225,285.

SUMMARY OF THE TRADE OF CANADA: MONTH AND TWELVE MONTHS ENDING APRIL, 1923

(Compiled by External Trade Branch, Dominion Bureau of Statistics)

Main Groups	Month of April, 1923			Twelve Months ending April, 1923		
	Total Imports	From United Kingdom	From United States	Total Imports	From United Kingdom	From United States
Imports for Consumption	$	$	$	$	$	$
Agricultural and Vegetable Products	13,224,898	2,138,399	5,725,746	164,728,342	27,279,189	73,546,287
Animal Products	3,051,931	284,416	2,087,827	47,031,182	3,203,419	34,817,418
Fibres and Textile Products	14,575,638	5,977,422	6,598,073	174,318,060	71,118,696	79,533,944
Wood, Wood Products and Paper	3,255,484	184,347	2,973,652	36,698,072	2,706,931	32,713,189
Iron and its Products	14,189,834	1,195,855	12,866,369	143,792,358	13,341,885	128,707,718
Non-Ferrous Metal Products	3,641,397	295,351	3,150,778	38,968,476	3,760,849	33,020,599
Non-Metallic Mineral Products	11,188,530	791,803	9,789,969	145,000,031	12,920,711	119,204,469
Chemicals and Allied Products	2,035,068	323,846	1,427,525	25,963,806	3,768,585	18,421,635
All other Commodities	3,018,540	456,933	2,307,213	46,450,582	7,092,392	35,010,079
Total Imports, 1923	68,181,320	11,648,372	46,927,152	822,950,909	145,192,657	554,975,338
1922	47,695,454	7,743,386	32,869,246	730,188,939	111,358,842	507,268,462
1921	65,310,847	13,519,887	41,558,980	1,207,178,994	207,671,779	834,753,761
	Total Exports	To United Kingdom	To United States	Total Exports	To United Kingdom	To United States
Exports (Canadian Produce)	$	$	$	$	$	$
Agricultural and Vegetable Products	16,669,577	8,584,959	1,122,886	415,817,050	273,558,757	42,007,181
Animal Products	5,911,201	2,497,596	2,712,882	136,726,430	64,849 129	55,867,957
Fibres and Textile Products	531,895	102,914	360,918	8,103,369	1,107,995	4,694,787
Wood, Wood Products and Paper	17,392,855	625,173	15,546,109	235,171,336	20,050,032	197,804,775
Iron and its Products	5,164,116	820,572	1,041,056	53,559,012	11,840,066	9,972,374
Non-Ferrous Metal Products	3,645,091	400,326	2,293,663	46,200,020	8,229,147	29,199,753
Non-Metallic Mineral Products	2,153,207	110,177	1,561,515	28,866,008	806,213	21,782,899
Chemicals and Allied Products	1,072,445	171,548	548,958	14,336,734	2,089,496	7,952,564
All other Commodities	1,101,864	294,591	756,344	14,396,235	2,518,431	10,243,451
Total Exports, 1923	53,642,251	13,607,856	25,944,331	953,176,194	385,049,266	379,525,741
1922	31,917,500	7,626,035	15,498,808	728,877,445	294,555,487	285,112,500
1921	43,280,735	12,432,223	22,974,951	1,179,088,050	312,437,564	539,818,047
Exports (Foreign Produce)						
Totals, 1923	685,825	31,195	594,042	13,795,678	854,471	11,204,392
1922	734,541	27,805	657,153	13,625,895	993,388	11,460,136
1921	794,975	35,935	712,551	19,545,280	1,407,961	16,634,345

Errata. The table below is to replace that published in the Commercial Intelligence Journal No. 1007 (May 19, 1923, page 780), in which statistics of **Total Exports** from Canada were inadvertently substituted for **Exports to United States** alone, for April, 1923, and were included in the figures for the Seven months ended April, 1923.

EXPORTS FROM CANADA TO THE UNITED STATES OF PRINCIPAL COMMODITIES PRODUCED ON CANADIAN FARMS, OR MANUFACTURED DIRECTLY FROM SUCH FARM PRODUCTS, DURING THE MONTH AND SEVEN MONTHS ENDED APRIL, 1920 to 1923; WITH UNITED STATES TARIFF RATES IN FORCE

Commodities		Month of April				Seven Months ended April				United States Tariff Rates in force		
		1920	1921	1922	1923	1920	1921	1922	1923	Prior to May 27, 1921	From May 27, 1921 to Sept. 21, 1922	Subsequent to Sept. 21, 1922
Animals (except for improvement of Stock)—												
Cattle	No.	6,660	15,531	2,346	3,983	316,277	198,266	110,292	116,694	...	...	...
	$	278,968	535,686	40,492	99,425	27,696,077	14,103,323	2,043,329	3,272,431	Free	30 p.c	(a)
Horses	No.	231	88	96	164	1,671	1,413	1,301	986	...	...	...
	$	39,574	18,503	18,030	27,789	280,844	327,632	304,394	144,678	10 p.c.	10 p.c.	(b)
Poultry	No.	4,016	8,680	6,228	2,194	496,099	564,442	565,096	411,111	...	...	...
	$	4,989	10,097	6,098	1,977	512,471	637,930	561,432	394,303	1 c. per lb.	1c. per lb.	3c. per lb.
Sheep	No.	4	27	5	...	137,463	121,500	58,070	29,347	...	...	...
	$	63	272	25	...	1,471,950	1,095,472	325,102	193,523	Free	(c)	$2 per head
Fruits—												
Apples, green or ripe	Brl.	20,599	32	1	624	237,711	12,051	393,308	62,351	...	...	...
	$	54,584	228	4	1,911	817,460	60,806	2,000,704	290,438	10c. per bush.	30c. per bush.	25c. per bush.
Apples, dried	Lb.	125,756	...	...	36,500	711,829	...	658,754	65,700	...	...	...
	$	15,245	...	...	4,200	93,775	...	76,092	7,120	1c. per lb.	1c. per lb.	2c. per lb.
Berries, fresh	$	...	...	...	2,818	31,094	28,874	46,227	62,758	½c. per qt.	½c. per qt.	1c. per lb.
Grains—												
Barley	Bush.	14	10	12,581	122	62,176	193	16,625	936,945	...	...	...
	$	36	22	9,906	124	80,492	257	12,167	497,869	15c. per bush.	15c. per bush.	20c. per bush.
Beans	Bush.	1,208	...	622	29	4,377	2,723	4,143	68,542	...	...	...
	$	6,207	...	2,487	82	21,669	11,056	13,086	208,134	25c. per bush.	$1.20 per bush.	$1.05 per bush.
Buckwheat	Bush.	17,060	18,324	6,810	16,094	16,714	219,949	95,722	220,211	...	...	...
	$	27,794	21,919	7,523	13,895	118,229	254,970	80,074	181,586	Free	Free	10c. per cwt.
Oats	Bush.	558,835	394,386	179,439	5,363	2,970,340	1,492,390	1,631,599	177,108	...	...	...
	$	549,696	177,852	98,626	2,490	2,607,001	803,595	780,348	90,759	6c. per bush.	6c. per bush.	15c. per bush.
Pease, whole	Bush.	4,025	11,625	6,348	6,531	51,266	55,243	102,125	146,173	...	...	...
	$	26,289	34,421	21,199	12,765	327,792	271,552	340,484	377,439	10c. per bush.	10c. per bush.	60c. per bush.
Pease, split	Bush.	747	2,138	...	...	7,955	3,738	14,455	3,157	...	...	...
	$	4,750	5,762	...	...	30,318	10,202	54,180	9,937	20c. per bush.	20c. per bush.	75c. per bush
Rye	Bush.	16,116	6,339	1,672	...	440,789	296,672	83,024	436,215	...	...	...
	$	32,794	8,628	1,678	...	677,707	484,297	68,291	334,460	Free	Free	15c. per bush.
Wheat	Bush.	17,852	3,003,452	14,391	108,781	2,260,136	43,601,999	9,275,470	8,995,470	...	...	...
	$	45,677	5,290,301	19,017	88,182	5,362,386	92,089,524	10,391,287	9,624,118	Free	35c. per bush.	30c. per bush.
Grain Products—												
Bran, shorts and middlings	Cwt.	2,400	63,467	4,696	34,604	282,018	763,953	269,576	1,479,099	...	...	...
	$	6,043	73,138	8,522	50,431	638,774	1,261,506	270,529	1,685,967	10 p.c. or free	10 p.c. or free	15 p.c.
Wheat Flour	Brl.	95	97,282	62,732	12,819	27,681	1,191,285	476,498	311,296	...	...	...
	$	1,235	892,784	408,155	77,292	318,5471	1,756,136	2,918,776	1,863,741	Free	20 p.c.	78c. per cwt.
Meats—												
Bacon, hams, shoulders and sides	Cwt.	571	219	277	115	7,073	2,312	573	893	...	...	...
	$	15,823	7,746	4,698	3,611	185,099	84,385	26,726	29,192	Free	25 p.c.	2c. per .b
Beef, fresh, chilled or frozen	Cwt.	32,324	15,868	13,048	5,372	228,818	163,661	120,088	88,444	...	...	...
	$	704,298	250,583	158,249	64,514	3,863,223	2,401,160	1,307,246	1,033,854	Free	2c. per lb.	3c. per lb.

Mutton and lamb, fresh, chilled or frozen	Cwt.	2,867	317	1,109	....	43,179	40,634	55,889	12,098	....	....	....
	$	69,154	7,266	14,557	....	956,687	1,036,487	944,448	294,304	Free	2c. per lb.	(d)
Pork, fresh, chilled or frozen	Cwt.	717	663	170	495	6,088	5,271	5,389	4,861	....	....	....
	$	19,904	17,381	6,598	18,253	147,697	193,988	132,262	135,000	Free	2c. per lb.	¾c. per lb.
Pork, dry-salted and pickled	Cwt.	35	....	....	....	3,553	622	331	5	....	....	....
	$	482	....	....	....	87,421	9,795	1,917	99	Free	25 p.c.	2c. per lb.
Poultry, dressed or undressed	$	2,888	17,378	10,164	8,528	113,723	478,070	694,955	557,757	2c. per lb.	2c. per lb.	2c. per lb.
Other meats, including canned meats, but excluding extracts	cwt.	1,673	1,579	1,074	1,052	19,239	12,476	6,502	7,585	....	....	....
	$	32,484	26,173	21,205	12,714	283,629	214,299	82,150	130,124	Free	25 p.c.	20 p.c.
Milk and milk products—												
Butter	Lb.	538,592	41,951	485	147,228	7,472,241	1,544,204	2,626,162	2,495,969	....	....	....
	$	314,998	8,600	207	55,589	4,242,229	757,441	957,318	1,015,612	2½c. per lb.	6c. per lb.	8c. per lb.
Cheese	Lb.	71,866	4,045	277,900	4,500	3,545,902	279,439	3,212,282	1,979,100	....	....	....
	$	21,478	1,694	45,394	1,533	938,409	78,543	496,610	373,757	20 p.c.	23 p.c.	(e)
Cream	Gal.	43,039	48,149	80,879	89,780	301,288	434,542	806,893	660,013	....	....	....
	$	63,925	68,013	131,056	177,776	485,936	695,700	1,181,510	1,258,665	Free	5c. per gal.	20c. per gal.
Milk, fresh	Gal.	80,821	58,842	20,792	30,995	1,112,821	584,797	672,462	511,672	....	....	....
	$	22,346	13,651	4,585	6,686	340,818	175,258	157,340	118,647	Free	2c. per gal.	2½c. per gal.
Milk, condensed, including milk powder	Lb.	425,040	940,799	....	164,000	5,860,138	6,846,556	88,257	5,485,387	....	....	....
	$	76,488	198,086	....	17,840	977,951	1,187,985	16,884	684,181	Free	2c. per lb.	1c.—1½c. lb.
Seeds—												
Clover seed, alsike	Bush.	722	9,993	3,714	2,395	80,678	68,072	91,859	38,104	....	....	....
	$	23,633	91,660	35,262	15,759	2,114,943	777,510	833,110	261,142	Free	Free	4c. per lb.
Clover seed, alfalfa and red	Bush.	23	140	1	15,203	2,821	2,112	6,701	15,274	....	....	....
	$	792	1,316	16	69,360	79,052	22,310	68,141	70,451	Free	Free	4c. per lb.
Clover seed, other	Bush.	861	25,461	10,011	500	45,862	80,308	51,112	75,043	....	....	....
	$	18,387	90,358	44,087	2,500	796,502	325,603	208,391	368,772	Free	Free	(f)
Flaxseed	Bush.	3,746	42,588	12,696	103,178	453,078	871,660	1,437,861	1,808,941	....	....	....
	$	18,979	67,728	29,932	263,257	2,196,926	1,807,866	2,691,883	3,885,868	20c. per bush.	30c. per bush.	40c. per bush.
Grass seed	Bush.	369	3,380	2,496	1,130	29,717	79,734	65,998	53,083	....	....	....
	$	1,476	6,624	9,026	1,897	100,353	163,609	269,667	102,053	Free	Free	2c. per lb.
Vegetables—												
Potatoes	Bush.	1,019,302	273,419	158,642	75,290	4,640,990	2,061,215	1,379,060	363,897	....	....	....
	$	2,781,169	125,306	77,215	48,589	7,859,115	1,572,056	952,482	271,868	Free	25c. per bush.	50c. per cwt.
Sugar beets	Ton	....	....	....	....	7,723	11,502	10,481	11,430	....	....	....
	$	....	....	....	....	70,235	103,175	63,151	56,730	5 p.c.	5 p.c.	80c. per ton
Turnips	Bush.	41,102	18,798	25,048	66,402	1,963,273	1,641,028	1,571,732	1,923,950	....	....	....
	$	20,845	4,466	8,531	14,060	894,009	394,658	427,957	280,737	15 p.c.	15 p.c.	12c. per cwt.
Miscellaneous Products—												
Eggs	Doz.	6,205	4,903	2,361	273	81,543	142,170	114,149	71,260	....	....	....
	$	2,821	1,536	629	82	50,480	90,544	54,268	30,314	Free	Free	8c. per doz.
Hay	Ton	17,199	4,980	121	6,383	128,384	56,582	1,384	19,848	....	....	....
	$	368,402	93,066	3,375	72,273	2,301,711	1,231,367	30,633	216,071	$2 per ton	$2 per ton	$4 per ton
Maple sugar	Lb.	3,583	12,046	15,872	2,596	936,735	1,228,549	1,457,626	148,562	....	....	....
	$	1,232	2,637	2,756	617	268,946	287,170	112,987	34,117	3c. per lb.	3c. per lb.	4c. per lb.
Tallow	Cwt.	290	1,120	603	....	17,779	10,955	11,092	11,418	....	....	....
	$	2,903	3,853	3,524	....	278,708	71,222	59,995	89,876	Free	Free	½c. per lb.
Wool	Lb.	4,035	524,721	63,365	230,848	2,900,431	5,968,947	311,054	4,707,434	....	....	....
	$	2,688	153,800	13,870	71,422	1,786,227	1,488,482	49,364	1,472,336	Free	(g)	(g)
Total value of above commodities	$	5,681,539	8,328,534	1,266,698	2,310,241	72,506,615	138,845,815	32,107,897	32,010,788	....	....	....

(a) Cattle weighing less than 1,050 pounds, 1½c. per lb.; 1,050 pounds or over, 2c. per lb. (b) Horses valued at not more than $150 each, $30 per head: more than $150 each, 20 per cent. (c) Sheep, one year old or over, $2 per head: less than one year old, $1 per head. (d) Mutton fresh, 2½c. per lb.: lamb, fresh, 4c. per lb. (e) Cheese, 5c. per lb. but not less than 25 per cent. (f) Clover seed, crimson, 1c. per lb.: white, 3c. per lb. and other, 2c. per lb. (g) Dutiable various rates. See **Commercial Intelligence Journal** No. 974, Sept. 30, 1922, pages 516-7.

TRADE CONDITIONS IN GREAT BRITAIN

Trade Commissioner Harrison Watson

London, May 16, 1923.—The more encouraging conditions which have lately been experienced characterized home trade during April, which was otherwise featureless, and except that the April returns of external trade for the first time excluded the imports and exports of the Irish Free State—an occurrence which incidentally invalidates all statistics for purposes of comparison with the past—there were no special incidents of note.

When allowance is made for the Easter holidays, the value of imports was practically unchanged from March, and the increase in the valuation of total exports is due to larger re-exports, and not to any improvement in trade in British products. Indeed the maintenance of recent figures is mainly attributable to the continuation of heavy exports of coal, because there has actually been a decrease in exports of British manufactured goods, which is obviously an adverse factor.

All the same the gradual improvement in the industrial situation has continued, as is shown by the Government announcement of a steady decrease in the number of unemployed, which since January has averaged about 20,000 a week. Unfortunately, this recovery has been somewhat retarded during the month by disputes which broke out in the shipping and other industries, although several threatened strikes have been averted as a result of mutual concessions.

Upon the other hand, there are few signs of any alleviation of the severe depression from which agriculture is suffering, and which has been aggravated by the tense situation between farmers and labourers which developed during April in Norfolk and elsewhere. While the Government is giving the situation earnest and sympathetic consideration, and promises to introduce a number of palliative measures, the prospects of any immediate general improvement are not very hopeful, because even if a good harvest should be secured, it is certain that under existing conditions the British farmer cannot possibly profitably compete, without artificial assistance, with the prices at which wheat and certain agricultural products can be laid down here by outside producers.

BRITISH EMPIRE SHOPPING WEEK

A movement which has recently received impetus, and the development of which could be of great practical value to Canada, is the decision of Harrods' and other departmental stores to hold what is designated as a "British Empire Shopping Week." This is to commence on Empire Day, and during its continuation special prominence is to be given to goods produced within the Empire, both as regards display and selling. The idea, which is not altogether a new one, has been actively taken up by the press, and although the time available is extremely short, it seems probable that a number of retail firms in London and also some in the provinces will participate.

As far as can be ascertained, the statements made by certain newspapers that the week is being organized by the Dominion Governments is erroneous. It is now claimed that the plan was conceived by the Incorporated Association of Retail Distributors (a body which includes many of the large departmental stores in its membership) and the British Empire Exhibition authorities, whose object is to create greater interest throughout the United Kingdom in British Empire products.

The result of the press statement has, however, been the receipt by this office of a considerable number of applications from firms who have inferred that we are in a position to supply stocks of Canadian provisions, manufactured goods and other products for display purposes. This would be obviously impossible, but we are rendering all possible assistance by supplying would-be exhibitors with the names and addresses of the principal importers and agents in London who handle Canadian goods of all kinds, and several of whom have expressed willingness to loan particular Canadian goods which they handle. We have, moreover, arranged for several newspapers to give publicity to this.

If the idea of an Empire Shopping Week should catch on, there is no reason why it should not be repeated and indeed become an annual event, in which case preliminary preparation and organization, which is not possible this time, should greatly enhance its practical value.

PRESENT INDUSTRIAL AND ECONOMIC CONDITIONS IN IRELAND

Irish Free State

Glasgow, May 10, 1923.—The unsettled, almost tumultuous condition of Ireland for years past has created the impression, even in England, that Southern Ireland is in a condition bordering on insolvency, and that trade is stagnant. Notwithstanding the grevious damage done to trade alone through destruction of property, breaking of communications, and general turmoil, it is all the more creditable to the country's resiliency to report that such opinions respecting the Free State show remarkable ignorance of the facts, and that on the contrary Ireland has been, and continues to be, one of the few creditor nations of the world, although of course trade has latterly been greatly impeded. Her exports in cash value have been substantially greater than her imports for the six years ending December, 1921, the excess of exports over imports during that time amounting to £73,144,000, each year showing a favourable balance. This includes the whole of Ireland, as there are no figures at present available separating the Free State from Ulster. There are also no figures yet for 1922, but even so it is believed that the relative position of exports and imports has not altered unfavourably through civil disorder, because imports of manufactured goods are not likely to increase relatively to exports of agricultural products during periods of trouble, and Ireland's external trade is mainly an affair of exports of farm products and imports of manufactured goods.

At the end of June, 1922, the deposits in joint-stock banks in Ireland were £196,000,000, as compared with £189,000,000 of the year before, which again was an immense increase over the year 1913, the figure for that year being £62,000,000. The figure for 1922 is specially noteworthy when the fall in prices, and the world-wide agricultural depression—and agriculture is Ireland's principal industry—are considered.

Ireland's direct trade with countries other than Great Britain is a small matter. Her indirect trade is considerable, and this indirect trade must finally become a direct trade to an increasing extent as the Customs (the Free State from April 1 is separate from Great Britain and Ulster for Customs purposes) begin to operate. That indirect trade is mainly a question of reimports through Great Britain. The balance of her trade with Great Britain is therefore a very accurate indication of her national position in commerce and exchange. The position over a number of years as follows is striking and is provocative of thought:—

	Millions of Pounds Sterling,					
	1916	1917	1918	1919	1920	1921
Irish exports to Great Britain	106	133	152	174	202	126
Irish imports from Great Britain	84	97	110	132	159	92

The importance of Irish trade is revealed in the following figures, which show that Ireland is Great Britain's second best customer, and per head of population, by far the best. The figures are Great Britain's exports to the countries named in 1921, showing approximate populations:—

	Millons of Pounds Sterling.	Millons of Population
Ireland	93	$4\frac{1}{4}$
British India	111	320
United States	64	110
Australia	48	6
Canada	22	$8\frac{3}{4}$
France	56	36
Germany	41	65
Belgium	29	$7\frac{3}{4}$
New Zealand	15	$1\frac{1}{4}$

That is to say, Ireland with her population of $4\frac{1}{4}$ millions ranked only second to India with her vast population as a market for British products. She purchased far more than did the United States with a population of twenty-five times as great, and four and a half times more than did Canada with a population twice as great.

Taking the year 1913, it is a fact that Ireland's external trade per head of population exceeded that of the eighteen principal countries, except Holland, Belgium, New Zealand, and Switzerland. The following was the value of this trade: Spain, £4 7s.; Austria-Hungary, £5; Italy, £7; United States, £9; Union of South Africa, £10 4s.; Germany, £15 3s.; France, £15 5s.; Sweden, £16 4s.; Norway, £20 8s.; United Kingdom, £25 7s.; Denmark, £27 8s.; Canada, £27 8s.; Australia, £30 8s.; Ireland, £32 3s.; Switzerland, £34 1s.; New Zealand, £37 2s.; Belgium, £42 2s.; and Netherlands, £93 5s.

Notwithstanding the healthy condition of Irish trade as shown above, it would be a mistake to minimize, or make light of, the difficulties the country has to face in the restoration of property destroyed, in compensation to sufferers, and to balancing the revenue and expenditure of the Government, or to suggest that trade is now flourishing. But the fact remains that when peace is restored the aggregate population of the country has at its disposal vast credits for the development of the country and financing of its anticipated boom in trade and commerce which have been accumulating over a period of years.

IMPORT DUTIES

As previously reported in the *Commercial Intelligence Journal,* the Free State became separated from Great Britain for Customs purposes from April 1. The new arrangements merely involve the mechanical organization of tax and customs collection by the Irish Free State authorities. The taxes and customs duties remain substantially as before. Thus, Ireland at her customs houses will be collecting the same duties at the same rates as Great Britain at her customs houses, and not otherwise, except in one or two minor particulars. It must be realized that, in so far as Great Britain has departed from her free trade position, Ireland will be applying to Great Britain for the same treatment that Great Britain is extending to the world at large, except as such treatment is modified by British Empire preference. Because so much has the Free State adopted the British customs duties, that she is applying preferential rates to articles of Empire origin. Thus Indian tea, a most important item in Ireland, will benefit. Apparently the same preference will be extended to British goods entering the country, such as motor cars, watches, clocks, musical instruments, and cinematograph films. Accordingly British motor cars will retain some slight advantage as against American or French cars, but their former free trade advantage will be gone. The opportunity for Canadian cars in the Free State is therefore obvious.

Ulster

The six counties of Ulster, which should be thought of as a part of Great Britain for customs purposes, and separated from the rest of Ireland in that respect, have been for about a year as entirely free from civil disorder as Great Britain. During that time Ulster has been slowly regaining prosperity in common with other countries.

In the case of the linen trade, which ranks as the leading industry of Northern Ireland, exports during the month of January last exceeded those of any month during the preceding two years. The January output was not a sudden jump, but was reached by steady and successive increases during 1922. A difficulty which the linen trade is still faced with is the shortage of the necessary raw material, or rather it would be more accurate to say, the difficulty it will be faced with, if the linen industry progresses to the volume of business it reached in 1913, the steady progress recently made giving evidence of this possibility.

SHIPBUILDING

The outlook for shipbuilding, which, after the manufacture of linen, is the most important manufacturing industry in the north, is distinctly encouraging. The world's idle tonnage is being gradually placed in service, and the reduction of building costs, including labour, has been such that shipowners are being encouraged to place orders for new ships at costs upon which they can earn dividends. Evidence of the improvement is manifested in one Belfast shipyard in which 17,800 men are now employed against 14,000 men a few months ago. In the case of shipbuilding, however, it must always be remembered that a revival of this industry must follow, and cannot precede, a general trade revival throughout the world involving a greater exchange of commodities.

Prospects for Canadian Trade

Now, considering Ireland as a whole, which it is necessary to do so long as the figures used apply to the whole country, it seems plain that the opportunities for Canadian products follow the same general trend as those of the United States, which in the case of the latter country are being taken advantage of. If, therefore, a careful examination is made of the imports into Ireland from the United States, a very good idea will be obtained of the classes of articles in which Canadian exporters are likely to secure business.

The value of merchandise (c.i.f. at Irish ports) imported into Ireland from the United States without having been transhipped at ports in Great Britain was for 1916, £7,964,000; 1917, £6,962,000; 1918, £5,862,000; 1919, £9,062,000; 1920, £13,603,000; and 1921, £9,270,000. The total value of all merchandise exported from the United States to Ireland, whether transhipped at British ports or not, was in 1916, $37,000,000; 1917, $20,000,000; 1918, $7,000,000; 1919, $35,000,000; 1920, $42,000,000; and 1921, $29,000,000. The latter figures are from United States returns and of course do not include freight and insurance.

[PRINCIPAL IMPORTS INTO IRELAND FROM THE UNITED STATES.

Some of the principal products imported into Ireland from the United States in 1920 and included in the figures above for that year were as follows:—

Products	Value in Dollars	Products	Value in Dollars
Barley	1,822,000	All other wire	22,000
Oatmeal and rolled oats	534,000	Sole leather	17,000
Rye	257,000	Boots and shoes, men's	118,000
Wheat	13,507,000	Boots and shoes, women's	239,000
Wheat flour	3,986,000	Malt	148,000
Brooms	134,000	Linseed cake	565,000
Motor cars	1,023,000	Linseed meal	38,000
Parts of motor cars	62,000	Fuel and gas oil	726,000
Baking powder	154,000	Illuminating oil	1,651,000
Knit hosiery	31,000	Lubricating oil	588,000
Knit underwear	247,000	Gasoline	338,000
Hops	3,033,000	Wrapping paper	61,000
Parts of steam engines	2,932,000	Clover grass seed	38,000
Wire nails	57,000	Timothy grass seed	26,000
Pipes and fittings, wrought	40,000	Refined sugar	359,000
Steel sheets and plates	545,000	Unmanufactured leaf tobacco	3,060,000
Ship and tank plates	89,000	Sawed timber, pitch pine	239,000
Files and rasps	22,000	Yellow pitch pine	606,000
Saws	26,000	Hogsheads and barrels, empty	229,000
Barbed wire	29,000	Staves	232,000

Now, Ireland's imports from the United States are a very small fraction of her imports from Great Britain: in 1920 the figure was £159,000,000 from the latter and less than £9,000,000 from the former. But Ireland's external trade is so immense that, notwithstanding the fact that the relative position of the United States to Great Britain is unimportant, and is apt to be overlooked, the imports from the United States are by no means small, and cover a wide range, which Canada is in a position very considerably to supply. Energy and great attention to detail are required to work up the business, however, and careful consideration respecting the appointment of representatives in Ireland for direct trade is essential, particularly in view of the tariff now operating between England, Scotland, and Ulster on the one hand, and the Free State on the other. The Canadian Trade Commissioner at Glasgow, who has given considerable study to trade in Ireland for some years, will be very glad to give advice and assistance to any Canadian firms who are prepared to seriously undertake direct trade to Ireland in the products, in the main, indicated above. It cannot be too often repeated that prices in sterling, c.i.f. port of destination, are a *sine qua non* of business in these islands from countries abroad.

COMMERCIAL CONDITIONS IN SCOTLAND

TRADE COMMISSIONER GORDON B. JOHNSON

Glasgow, May 12, 1923.—Threats of strikes and lockouts have once more been filling the air after a year or more of comparative industrial peace, creating a feeling of uneasiness in trade circles, but actual stoppages have not materialized in any degree. The lesson of the past few years has apparently been well learned: that the loss entailed by the stoppage of work has to be paid for, and the industry concerned has ultimately to pay for it, workmen as well as owners.

Shipbuilding and Engineering.—Some substantial business has recently been booked at many yards up and down the Clyde. About 108 ships are now in hand in the Clyde yards, the tonnage aggregating 532,000. This is 25 ships and 28,000 tons better than at the end of 1922. A sign of the times is the fact that at the present time a dozen large motor ships are being built. One large yard has had to close down because it could not secure delivery of 6,000 tons of ship plates ordered from the Ruhr before the French occupation.

Locomotive firms are busy and a good deal of railway rolling stock in general is now in hand by the Scottish producers. Iron and steel firms in Scotland have been experiencing a surprisingly large demand for their products, both from home and abroad. Production is proceeding at very high pressure, and large tonnages are being turned out.

Coal.—The boom in coal exports continues, and all the Scottish coal fields are booked up with orders for many weeks ahead. Prices rule high. There is considerable congestion at all shipping ports. Many new pits are being sunk, seven in Lanarkshire and the Lothians alone.

Tweeds and Hosiery.—There is not yet sufficient confidence to enable merchants to place orders in more than a limited amount. Many have still considerable stocks and until these are liquidated stocking up with the newer cloths will be delayed. Business is quiet with most of the hosiery and underwear manufacturers.

General Position.—The state of trade is on the whole better than cautious observers a few months ago might have expected. The numbers of unemployed are sinking slowly but surely. Whereas at the height of the depression eighteen months ago the unemployed numbered over two millions, they have now been reduced to little more than half that figure. This perhaps is as good an indication of trade recovery as could be furnished.

Export trade continues to increase, and already exceeds 75 per cent of its pre-war volume. There is something like a boom in iron and steel, and coal exports are almost unprecedented. Shipping is fairly active and even shipbuilding—the last industry to feel the effects of convalescence—is beginning to show signs of a return to health. Were it not for the disturbing conditions arising from the occupation of the Ruhr, and its twin companions, reparations and national debts, it would not be unsafe to prophesy a rapid movement back to normal conditions this year.

CANADIAN CATTLE IN BIRKENHEAD

Trade Commissioner J. Forsyth Smith

Liverpool, May 15, 1923.—Birkenhead, although as important a centre as any in the United Kingdom for the distribution of store cattle, has been behind both Manchester and Glasgow in receiving her first shipments of these, and, so far, has only had regular shipments of Canadian fat cattle, and no stores. The trade attribute this to the fact that boats fitted up to carry cattle direct from Canada, to the two former ports, were available before the Montreal season opened, while Birkenhead has had to wait for direct connections until the Montreal boats arrive. They express, however, the greatest interest in the new branch of trade, which they state will be well received by their connections.

The facilities at Birkenhead are well adapted to facilitate the handling of considerable quantities of cattle, as the lairages are close to the Mersey river and connected with the dock by an overhead runway, and the animals can be placed in the quarters they occupy until sold in three minutes after being landed. Accommodation can be provided for 3,000 cattle and 15,000 to 16,000 sheep. Excellent facilities also exist for the transfer of cattle to the cars for transportation to destination after purchase, railway sidings enabling the cars to be switched to the doors of the lairages.

Birkenhead as a distributing point will serve the cattle buyers of a large part of England, and especially of the agricultural counties of Yorkshire and Norfolk.

CANADIAN FAT CATTLE

Regular shipments of Canadian fat cattle have been received at Birkenhead this season, these all arriving via American ports. The condition and quality of the animals arriving has been very favourably commented on by the trade. Prices ranged from $10\frac{1}{4}$d. to $10\frac{3}{4}$d. per pound in sink, but the cattle on the last boat, the ss. *West Cohas*, some 550 head, were sold at a satisfactory advance over this, 11d. to $11\frac{1}{2}$d. per pound. This rise in value was due partly, no doubt, to the colder weather, but mainly to the comparative shortage of supplies from Ireland owing to the beginning of the Irish grass feeding season.

BIRMINGHAM MARKET FOR HANDLES

Acting Trade Commissioner Douglas S. Cole

PICK HANDLES

Bristol May 17, 1923.—As has been noted in previous reports (see *Journal* No. 962: August 26, 1922) there exist considerable differences between types of pick handles suitable for Scottish and South Wales miners, whilst the North of England demands in turn a still different type. Some activity is to be seen at the present time, and one large firm, with headquarters in Birmingham and branches throughout the United Kingdom, and who command a large export trade throughout the world, desire quotations on the following business. The name of this firm may be obtained by interested Canadian firms on application to the Director, Commercial Intelligence Service, Ottawa, and a trade inquiry outlining their general requirements is published in this issue (page 916). This large firm are not brokers but are a merchant house and desire an exclusive United Kingdom agency for a sound Canadian firm who are not represented on this side. They desire quotations on Universal, Acme, and Scottish and Welsh miners' pick handles as well as navvy pick handles in car load lots f.o.b. seaboard or c.i.f. Liverpool. These come in four different grades 1, 2, and extra, standard eye being necessary in all cases. It is always advisable when forwarding quotations to state whether packed in cases or in bags, and indications of weight per dozen are also necessary.

SHOVEL STEMS

Again the needs of the market are quite specific, and the above firm state the largest demand is for the 28-inch, 30-inch and 32-inch for XX and X and 1's with a diameter of $1\frac{1}{2}$ inches to $1\frac{9}{16}$ inches taper, for ash shovel stems. They are prepared to accept an initial shipment of from five to six car load lots if quality and price are right, the first car load to be shipped immediately but not before samples have been seen and approved prior thereto. Shovel stems are generally shipped in two-dozen bundles, well tied, whilst separate prices are quoted for each grade. For mixed car load lots it is suggested that cars should be graded to contain 60 per cent of 1's, 25 per cent of X, and the balance of XX. Stems should load in the vicinity of 4,000 to the car load lot, whilst weights for 32-inch stems should be from $17\frac{1}{2}$ to $18\frac{1}{2}$ pounds per dozen.

BROOM HANDLES

This Birmingham firm of importers state that they often are at a loss to know what type of wood is being shipped for current lots of broom handles, and it is suggested that types of timber used therein should in all cases be given. In this case bundles done up in four dozen each are most acceptable, diameter of handles to be 1-inch and $1\frac{1}{4}$-inch. Quotations in car-load lots are desired.

A certain amount of interest has been shown for maple broom handles, which are used for vacuum cleaners. Such maple handles are not desired polished; sizes 1-inch and $1\frac{1}{4}$-inch with screw ends, the length of the screw being about $1\frac{1}{2}$ inches. Quotations on above in car-load lots only desired.

D HANDLES

Birch, beech and maple D handles are not looked upon favourably owing to excessive warping, ash handles being the exclusive demand. Quotations on No. 1, X and XX are desired in car-load lots.

A certain amount of business is being done in Blue 1's in lengths of 30-inch and 32-inch. It may be explained that these Blue 1's are a grade of D handles which have been found defective and unsuitable by shovel manufacturers in Canada and the United States. These are repaired by small metal strips, etc., which is work peculiarly suitable for Birmingham; riveted on to the handle and a label pasted over defective parts and sold at a cheap price to the trade. With reference to shipments of D handles, it should be noted that there are roughly 2,000 dozen handles to the car-load lot, and the weights of these handles should be in the vicinity of 19 to 21 pounds per dozen.

MISCELLANEOUS

There is always some trade to be done in slasher, mattock and sledge handles provided prices are right. Quotations on assorted car-load lots for the above c.i.f. United Kingdom ports will be considered.

Blind Rollers.—There is some interest in blind rollers, this office being prepared to forward c.i.f. quotations in sterling for car-load lots.

In many ways Birmingham is a very valuable distribution point, and if Canadian companies can establish a firm and steady connection with Birmingham firms such as the one referred to in this report, who export shovels, picks, etc., sufficient business could result to keep one or more Canadian factories employed throughout the year. Naturally competition is exceedingly keen, and only articles manufactured to the English standard and strictly to the wishes of these firms will result in business of a permanent nature.

HEAVY FALL IN BUTTER AND CHEESE PRICES IN GREAT BRITAIN

Trade Commissioner Harrison Watson

London, May 18, 1923.—Messrs. Samuel Page and Son, the provision brokers, dealing in their monthly report with the heavy fall that took place in the London price of dairy products in April, call attention to the extremely heavy imports of practically all commodities as the chief reason for the decline. Quoting the official trade statistics, they point out that in comparison with 1922 the net increases in April's imports are as follows: butter, 58,041 cwts.; cheese, 129,183 cwt.; bacon, 119,449 cwts.; hams, 40,909 cwts.; eggs, 522,605 long hundreds.

As regards butter, the chief increase came from Denmark, 140,835 cwts. having arrived as against 90,885 cwts. in April last year. This quantity is considerably more than one-fourth of the total imports and represents an advance of over 50 per cent as compared with April, 1922, so it is not surprising that prices have had to be reduced. At the end of March, Danish was quoted at 200s. to 202s., and finest New Zealand at 188s. to 192s., while present quotations are respectively 152s. to 156s., and 142s. to 144s. per cwt. Retail figures have dropped in sympathy from 2s. 2d. per pound to 1s. 6d. and 1s. 4d.,

but it is stated that it is doubtful to what extent this reduction has caused a larger consumption. Messrs. Page refer to the fact that the public have to some considerable degree substituted best margarine at 10d. to 1s. per pound for butter in their household requirements, and express the opinion that even the present price of butter is not sufficient inducement to materially influence the demand. In the meantime, the market continues exceedingly quiet, buying is of a hand-to-mouth character, and as there are still large quantities of Australasian butter landing and near at hand, it does not seem probable that there will be any recovery in the near future.

Plentiful New Zealand supplies are also the reason for the decline in cheese values, imports of this commodity during April being 142,055 cwts. more than in March. To-day's prices for white and coloured are 90s. to 92s. per cwt., the former having fallen by 18s. and the latter by 26s. in comparison with a month ago. It is mentioned that Canadian is pressed for sale at 87s. c.i.f. without finding buyers, as it is anticipated that the retail price of cheese will have to be reduced to 10d. per pound. Another factor in bringing about the decline has doubtless been finance. Many importers of both butter and cheese have been compelled to realize on one or the other.

At the moment, Messrs. Page remark, buyers give the preference to New Zealand as it is ready for cutting, whereas Canadian fodders are mild; but in the course of a few weeks Canadian will arrive with more flavour and New Zealand with too strong a taste, as a result of keeping or late production, and then the preference will be reversed. Buyers all the time require cheese which can be retailed at once, without having to store it until maturity, but they also do not desire full-flavoured or strong cheese. It is added that consumption will increase considerably as the season advances.

AUSTRALIAN FINANCIAL CONDITIONS

TRADE COMMISSIONER D. H. ROSS

Melbourne, March 27, 1923.—The absorbing topic of paramount importance to the commercial and financial community of Australia is that of the protracted absence of rain upon which the trading position of the Commonwealth so materially depends. This question dominates every phase of commerce, and now the ardent hope is that April showers will come in persistent volume to permit the autumnal sowing of wheat and to provide the vast herds of cattle and flocks of sheep with both feed and water for the winter months.

Unquestionably, in some of the states, the lambing season has been a failure, hence there is the apprehensive apparition of decreasing flocks and curtailed production of Australia's greatest staple. The seriousness of the diminished flocks of sheep has not yet been fully realized by reason of the high prices for wool ruling in recent years, but this aspect is now receiving closer attention of growers. There are, of course, other factors contributing to the position, such as the increased cost of labour and heavier transportation charges, in addition to unremunerative export prices for frozen mutton.

On the resumption of the wool sales in Melbourne on March 19, a firmer tone was apparent, with a good demand, especially from the United Kingdom and North America. Prices have indicated an upward tendency of about 5 per cent on merinos and comebacks.

With the advance in several oversea markets, wheat prices have moved sympathetically, and this mail closes with quotations substantially higher than they were a year ago. To-day wheat is quoted at 5s. 3d. to 5s. 3½d. ($1.28 to $1.29) per bushel f.o.b. steamer Melbourne and Adelaide. The market is firm,

due to inquiries from the Continent, and due also, to some extent, to the drought conditions prevailing in the wheat-growing states.

A month ago the flour market was quite depressed, and millers accepted low prices in order to keep their mills fully occupied. To-day, through inquiries from the United Kingdom, Mediterranean ports, Egypt and the Orient, prices have advanced to £10 7s. 6d. ($50.49) to £10 12s. 6d. ($51.71) per ton of 2,000 pounds, f.o.b. steamer, packed in sacks of 150 pounds. It is considered that the market is not likely to recede while the demand for by-products (bran and shorts) is so active for domestic requirements.

For the first seven months of the Commonwealth fiscal year which ended on January 31 the imports were valued at £77,248,406, being an increase of £24,208,216 over the corresponding previous period. The exports amounted to £68,138,537, showing an adverse trading balance of £9,109,869 for the seven months.

Generally the demand in London and throughout the Commonwealth for Australian gilt-edged securities has been so well maintained that investors are apparently prepared to pay higher prices for the stocks. The stability of the money market is considered to be distinctly favourable in the negotiations with respect to the conversion of maturing issues and the raising of fresh loans both in London and in Australia.

Considering the adverse climatic conditions which have been experienced for some months, it is rather remarkable that the volume of general business has been so well maintained. While, in some lines, stocks of goods are held quite above normal (especially stocks of dry goods), orders have been freely placed for grocery and hardware lines, although heavy hardware and iron and steel products have indicated considerable contraction.

The mail closes with the financial trading position being upon a sound and conservative basis. Trade generally, as is usual between seasons, is without animation.

AUSTRALIAN COMMONWEALTH CONVERSION LOAN

C. Hartlett, Office of the Trade Commissioner

Melbourne, April 23, 1923.—The Commonwealth Treasurer has issued an invitation to holders of the Commonwealth 5 per cent stock and bonds maturing on September 15, 1923, to convert their holdings into an equal amount of stock or bonds maturing on September 15, 1948. The total amount is £38,700,000, which was raised in 1918 for war purposes.

The new loan will bear the same rate of interest as the one it will replace, and though subject to Commonwealth income tax will be free of State taxation. Conversion will be effected at face value without charge, and a cash bonus of £1 for each £100 converted is to be given. Taking the bonus into consideration, the rate of interest works out at £5 1s. 5d. per cent per annum, over the whole period of the loan. Holders are given until May 31, 1923, to convert, and if the conversion operation is not a success holders will be paid in full from the proceeds of a new loan to be floated either in Australia or London.

In view of the strong probability of a further fall in the rate of interest, it is considered in financial circles that the terms of the conversion will appeal to the 200,000 holders in the maturing loan, who are assured of a safe investment for twenty-five years at a satisfactory rate of interest, and at the same time readily negotiable into cash should the need arise. It is already announced that some leading life insurance companies and other financial concerns who are large holders of Commonwealth securities will take full advantage of the conversion offer.

AUSTRALIAN INVOICE REQUIREMENTS: NEW PUBLICATION

Mr. D. H. Ross, Canadian Trade Commissioner in Melbourne, has prepared a report entitled "Australian Invoice Requirements and Other Trade Regulations Applicable to Imports into the Commonwealth," which has just been issued as a separate publication of the Department of Trade and Commerce, in a convenient form for filing. This publication is one that should be in the hands of all Canadian exporters to Australia, as it embraces the kind of information that is essential to them in their work as exporters. Among the subjects handled in this report are: requirements under the Commonwealth (Trade Descriptions Act); marking and regulations governing the various classes of goods imported; method of computing customs valuation; forms of invoice required by the Commonwealth Customs; packing, marking and numbering of cases; how to send quotations; parcel post shipments and rates to Australia; bills of lading; marine insurance; and shipping facilities for the Canadian exporter.

Copies of this publication may be obtained free of charge by Canadian firms on application to the Director, Commercial Intelligence Service, Ottawa.

IMPROVED BANKING RETURNS IN NEW ZEALAND

Trade Commissioner W. A. Beddoe

Auckland, April 23, 1923.—An excess of deposits over advances of £944,246 is shown by the aggregates of the returns issued by the six banks for the March quarter. A year ago there was an excess of advances over deposits of £6,130,925.

Following is a comparison of the various classes of deposits for the March quarter of the last two years:—

	March, 1923.	March, 1922	Inc.
Government	£ 5,193,821	£ 4,506,449	£ 687,372
Free	26.445.501	24.138,746	2,306,755
Fixed	17,020,313	16,221,644	798,669
Totals	£48,659,635	£44.866,839	£3,792,796

The advances and discounts compare as follows:—

	March, 1923.	March, 1922	Dec.
Advances	£40.785,349	£44,752,177	£3,966,828
Discounts	1,736,219	1,739,138	2,919
Totals	£42.521.568	£46,491,315	£3,969,747

The notes in circulation during the quarter averaged £6,632, 182, as against £7.510.451 in the corresponding period last year; while the coin and buillion held by the banks amounted to £7,929,266, as against £7,777,980 in the corresponding period in 1922.

The Prime Minister has announced a surplus of £1.350,000 for the financial year. It is also gratifying to note that the exports exceeded the imports by £6.000.000 sterling. These facts, taken with the bank returns issued, have had a reassuring effect on the financial situation, and money has become more plentiful and easier of access to traders. The Canadian dollar, buying rate, is $4.81, and the selling rate $4.74. All these facts taken together point out a brighter commercial future.

NEW ZEALAND RESUMES TRADE WITH FORMER ENEMY COUNTRIES

Mr. W. A. Beddoe, Canadian Trade Commissioner in Auckland, writes under date April 23, 1923, that under an Order in Council the Government of New Zealand has arranged to resume trade with Germany, Austria, and Hungary, as from September 1, 1923. This decision revokes the Order in Council dated July 26, 1920, prohibiting the importation of goods from Germany, Austria, or Hungary.

There has been considerable discussion in New Zealand commercial circles with respect to the resumption of trade with Germany, Austria, and Hungary on the date agreed upon, on the ground that goods have already been ordered for the Christmas trade, and it is feared that there may be heavy importations from those countries, arriving after September 1, which would militate against orders already given at prices which would be higher than those which would be in force when the former enemy countries re-enter the market.

The regulations under which this trade will be conducted have not yet been promulgated, but it has been indicated by the Government that the duties to be imposed are such as will protect British trade. The Orders in Council above referred to are on file at the Department of Trade and Commerce, Ottawa (file No. 20991).

SOUTH AFRICAN WEIGHTS AND MEASURES ACT

The Government *Gazette* of the Union of South Africa announces that the Governor-General has under and by virtue of the powers in him vested by section 53 of the Weights and Measures Act, 1922 (Act No. 32 of 1922), declared, proclaimed, and made known that the said Act commenced and came into operation on 1st April, 1923.

A report summarizing the provisions of the above Act was published in *Commercial Intelligence Journal* No. 980 (November 11, 1922).

INDIA'S RECORD WHEAT CROP

Trade Commissioner H. A. Chisholm

Calcutta, April 20, 1923.—The third and final wheat forecast prepared by the Government of India for the season of 1922-23 estimates that the total yield of wheat in British India will reach 11,399,000 long tons (roughly about 420,000,000 bushels) from 30,550,000 acres. This acreage is about normal, but the yield has broken all records in Indian history and represents an advance of 16 per cent as compared with the final outturn (9,817,000 tons) of last year, which was some 600,000 tons above the average yield for the preceding five years. A large wheat crop was expected this year as forecasted in two previous reports appearing in this journal, but no one looked for an 11,000,000-ton crop.

The Punjab supplied nearly 5,000,000 tons of this year's total yield as compared with only 3,700,000 tons last year, thus contributing about 80 per cent of the total increase over last year from the whole of India. Favourable weather conditions throughout practically the whole of the growing season have accounted for this remarkable yield in the Punjab; some red rust appeared early in March but it disappeared during the bright hot weather that followed. Wheat harvesting operations are now finished in Central India and are well under way in the Punjab. The average yield per acre for the whole of India is estimated at 836 pounds as compared with 744 pounds per acre last year.

NO GREAT EXPORT MOVEMENT

There is as yet little evidence of a considerable export movement. During the twelve months ending March, 1923, a total of 220,000 tons of Indian wheat was exported, as compared with imports into India from Australia of 440,000 tons during the previous twelve months and exports from India of 476,000 tons during the fiscal year 1918-19, 1,454,000 tons during 1917-18, and 748,000 tons during 1916-17. Exports of Indian wheat during March of this year amounted to 20,700 tons, during February to 29,100 tons, and during January to 63,900 tons.

During these three years the Indian wheat crop was fair to normal, but prices were so high that the Indian masses were forced to curtail consumption of wheat flour. There is evidence, however, that, per capita, India is now consuming more wheat flour than before the war, and that as long as world prices remain at the present comparatively low level, India's surplus of wheat for export will probably not amount to 10 per cent of her annual production. At present wholesale prices of wheat at inland points in the Punjab are between $1.05 and $1.10 per bushel.

GREAT IRRIGATION PROJECT FOR INDIA

Trade Commissioner H. A. Chisholm

Calcutta, April 20, 1923.—It is now understood that the Secretary of State has accorded his final sanction to the great Sukkur Barrage and Canal project on the river Indus in Sind. When completed, this irrigation project will be by far the greatest thing of its kind in the world. It will provide sufficient water for the cultivation of some 3,500,000 additional acres in the valley of the Indus, bringing the total area of cultivation in the district served by this project up to 5,900,000 acres. The immensity of this scheme may be realized when it is compared with Egypt's total cultivated area of 5,400,000 acres. The Sukkur Barrage project will thus provide for 500,000 acres more of cultivated land than there is at present in the whole of Egypt.

LARGE INCREASE IN OUTPUT OF WHEAT AND COTTON

It has been estimated by Government engineers that the completion of the Barrage canals will ultimately increase the present output of 70,000 tons of wheat in this area to 935,000 tons, of rice from 280,000 to 515,000 tons, of cotton from 52,000 to 190,000 tons, and other crops from 300,000 to 575,000 tons. At the present time this area ships out less than 200,000 tons annually of produce. It is expected that the Barrage will provide a surplus of nearly 1,400,000 tons of agricultural produce for shipment from this one area on the Indus.

COST OF THE PROJECT

The Government engineers who for several years have been working on the plans for the Barrage estimate that the total capital cost will be at least £12,000,000 sterling, and that the project will require about twelve years for completion. It will probably take from twenty to thirty years to bring the entire cultivable area served by the scheme under cultivation.

The capital required will probably be raised by a loan on the London market. It is estimated that this "productive" capital expenditure will pay over 6 per cent interest in the fifteenth year from commencing of works, and that in the thirtieth year after completion there will be an interest return of 14·6 per cent on all capital invested. Apart from its incalculable importance to the people of Sind and to the trade of India, the project will thus finally add from 4,000,000 to 5,000,000 dollars annually to the revenues of Government.

MAINTENANCE REQUIREMENTS OF THE JAMAICA GOVERNMENT RAILWAY

F. L. Casserly, Canadian Trade Commissioner's Office

Kingston, Jamaica, May 19, 1923.—The Jamaica Government Railway, traversing the island from east to west, with two branches running northwards, is state-owned, and is the only railway in Jamaica. The total length of line is 200 miles. A branch line of eleven miles is in course of construction by a Canadian company, and it is probable that there will be further extensions in the future, since there are several districts which need, and offer a profitable return on, railway facilities. The total capital outlay to the end of 1921, the latest available period of record, was £2,989,918. The expenditure for that year, exclusive of debt charges, which amounted to £161,042, was £384,594, while the revenue was £358,839.

Considerable quantities of various kinds of material are used annually for maintenance. The following return shows the quantities of such articles imported during the calendar year 1922:—

Air brake supplies	Tons	4½
Bolts and nuts	Tons	7
Bridge material	Tons	34
Blue stone	Tons	1½
Coal	Tons	17,752
Coke	Tons	50
Copper	Tons	2
Canvas	Yards	1,505½
Cement	Barrels	6,624
Fish plates	Tons	8
Files	No.	1,152
Glass	Panes	602
Iron (assorted)	Tons	16
R.R. keys (steel	No	5,000
Lumber (pitch pine)	Feet	286,712
Lumber (creosoted)	Feet	53,233
Locks, assorted	No.	720
Nails, assorted	Tons	7
Oil (lubricating)	Gallons	1,253
Oil (fuel)	Gallons	554
Oil (paint)	Gallons	410
Paints, assorted	Tons	1½
Roofing (galvanized iron sheets)	Sheets	675
Screws, assorted	Gross	326
Steel, assorted	Tons	49
Steel, structural	Tons	354
Spikes	Tons	43
Sleepers, creosoted	No.	12,887
Stationery and forms	Tons	7½
Staples	Tons	8½
Track bolts	Tons	23½
Tools and machinery	Tons	31
Wire	Tons	21
Waste	Tons	7
Washers, assorted	Tons	1½
Wheels, C. I. car	No.	360
Handles	No.	1,416
Tie plates	Tons	39,854

NOTES ON IMPORTS

The following notes on the above will be of interest to Canadian manufacturers:—

Coal.—Both English and American coal was imported, the preference given to the former whenever possible, in view of the settled policy of the Colonial Government. A coal contract recently passed to a Welsh exporting firm at 36s. per ton.

Cement.—The railway's business in this article is about evenly divided between the United Kingdom and Canada. The strong competition which began about nine months ago between English and Canadian cement in this market has since died down, and both brands are being sold at much the same price.

Lumber, Pitch Pine and Creosoted (Including Sleepers).—These supplies were purchased in the Southern United States, the sleepers coming from New Orleans. Small quantities of sleepers were bought by the railway for use in the construction of the branch line, but as that work only commenced on the 1st of January last, the majority of such supplies will be shown in the current year's returns. To date, Canada has not been able to compete successfully in this business.

METHOD OF PLACING ORDERS

The traditional procedure of all Jamaican purchasing departments is to send indents to the Crown Agents in London, from which source a large portion of the railway's orders is supplied. There are, however, several Canadian and also some English firms with resident local agents who, by keeping in close touch with the various departments, have in the past managed to secure a considerable share of the business. Thus Canadian cement and iron and steel goods have been sold to the railway in fairly large quantities. Of late, however, the Crown Agents appear to have been making their presence very much felt, and to have been insisting that every sort of material which is obtainable in Great Britain should be purchased through them, regardless of price and other factors of importance to the buyer. Recent cases in point are wire nails, where the British price was far above the Canadian; and steel bridges for the new branch line, which are over a month behind in delivery. This attitude can only be modified through personal solicitation; hence Canadian firms desirous of obtaining a share of the railway's orders should have local resident agents who are in a position to confer with railway officials at regular intervals.

CONDITIONS IN THE UNITED STATES

Frederic Hudd, Trade Commissioner in the United States

New York City, May 23, 1923.—Wholesale prices, which have been moving steadily upward since last summer, have received a check. Bradstreet's index number on May 1 shows a decline of 2 per cent as compared with a decline of only two-hundredths of 1 per cent in the preceding month. The fall in wholesale prices has not been great, but it has taken place in many lines, with the notable exception of wool. This fact, together with a drop in security quotations, is causing some apprehension as to the future of business. The present high rate of production in all industries has been affected by the factors referred to, and there has consequently been a falling off in the volume of general business. Bankers are of opinion that this development will not be without some advantage, as it will permit of a necessary readjustment of prices. The record building construction activity, which has been a feature of the last few months, has slackened on account of increased labour costs and wage demands and a shortage in some lines of material, but up to a few weeks ago many industries reached a new high record.

THE IRON AND STEEL INDUSTRY

The steel industry has reached a rate of production never before attained in its history. This is a rate of 50,000,000 gross tons a year. Mills are at capacity in most cases. There are indications that the present heavy deliveries will

continue except for seasonal lapses. Delivery premiums are decreasing, as the volume of prompt business is less heavy. There has been practically no change in the prices of finished steel products.

THE COTTON AND TEXTILE SITUATION

There is likely to be a cotton shortage in the South. The crop is late, and it is reported that outside of Texas and parts of Oklahoma it is doing poorly, owing to the excessive rains and unseasonably cold weather for the month of May. The supply of cotton available until the new crop comes on the market is inadequate to meet spinners' needs without considerable curtailment of the activities of the mills. The visible supply is about one-half what it was a year ago.

The market for manufactured cotton goods is stagnant. Production is beginning to overtake consumption and some mills are having to choose between accumulating goods or restricting production. The drop in the price of cotton has also been an important factor.

THE AUTOMOBILE INDUSTRY

The production of and demand for motor cars shows no decrease and a record output has been maintained since the beginning of the year, although manufacturers are prepared to curtail output at the first sign of a slackening in demand. There has been an increase in the output of tractors, due to greater buying activities in the rural districts.

THE LABOUR SITUATION

A recent survey of the labour supply situation in the United States by the National Industrial Conference Board, covering 2,263 plants employing 874,182 wage earners, showed places unfilled for 28,389 wage earners, indicating a shortage of 3·2 per cent in these plants on that date. The percentage of shortage ranged from 0·6 per cent in the cotton industry to 18·1 per cent in granite quarrying. For common labour the shortage was 5·4 per cent; for skilled labour, 2·5 per cent; and for female labour, 3 per cent.

THE MONEY MARKET

Failures and liabilities have decreased. Failures in the four months ending April were 116 a week, 21 per cent below the corresponding period of the previous year. Liabilities are one-third below those of the 1922 period.

There has been a slump in securities and a drop in bond values. New York Stock Exchange sales during April were 20,040,815 shares as compared with 25,855,492 shares in March. April bond sales were $243,271,620 as against $268,124,000 in March.

Companies to the number of 1,014, with an authorized capital of $100,000 or more, were organized during April with a total capitalization amounting to $1,006,258,000. In April of last year more companies were organized but their authorized capital was less.

During May foreign exchange on the New York market has remained fairly stable. There have been slight declines in sterling and the Canadian dollar has fallen a few points. Discount on the Canadian dollar on May 1 was $1\frac{62}{64}$ per cent. At the time of writing it is $2\frac{1}{32}$ per cent.

GERMAN ECONOMIC AND TRADE SITUATION

TRADE COMMISSIONER L. D. WILGRESS

Hamburg, May 7, 1923.—The month of April has been chiefly notable for a further weakening in the financial and economic position of Germany. The consequences of the occupation of the Ruhr have now begun to be widely felt, and the policy of the German Government in attempting to stabilize the exchange value of the mark received a severe setback during April.

FINANCIAL POSITION

The floating debt of Germany on April 30 amounted to 8,442,000,000,000 marks, an increase since the beginning of the month of 1,840,000,000,000 marks. The total note circulation at the end of April amounted to 6,545,984,355,000—an increase during the month of 1,028,064,704,000 marks. It is of interest to give the weekly increases to the note circulation and to the Reichsbank Discounts and Treasury Bills for the past seven weeks, as follows:—

Week ending	Weekly Increase: Note Circulation Marks	Weekly Increase: Discounts and Treasury Bills Marks
March 15	401,255,255,000	239,405,531,000
March 23	683,123,458,000	528,720,751,000
March 29	562,234,770,000	267,554,350,000
April 7	102,193,331,000	246,228,021,000
April 15	213,851,925,000	642,755,167,000
April 23	258,087,881,000	378,672,462,000
April 30	449,931,567,000	405,232,037,000

It will be noted from the above table that during the first three weeks of April there was some check to the progressive inflation of the currency, in spite of the great increase in the floating debt. The explanation would appear to be the reserves of notes accumulated through the large additions to the note issue during March and which were put into circulation during April.

At the rate of exchange of 31,300 marks to the dollar current on April 30, the gold value of the note circulation on that date was $209,136,880, while the gold reserves of the Reichsbank stand at 919,909,000 marks or the equivalent of $219,026,643.

EFFORTS AT STABILIZATION

The German Government through the Reichsbank has been making every effort to maintain the exchange value of the mark. For the first half of April they were successful and the mark remained steady at around 21,200 marks to the dollar. On April 18 and 19 there was a sudden fall in the value of the mark and the dollar rose to 33,000 marks. The next day there was a reaction, but a steady decline then set in and on April 30 the dollar was quoted at 31,300 marks.

A considerable controversy arose over the failure to maintain the exchange value of the mark, but it is now generally realized that in endeavouring to stabilize the mark at around 20,000 to the dollar the Government was attempting the impossible. On the other hand, it must be admitted that heroic efforts were being made to reform the finances of the country. In order to stop inflation and to balance revenue and expenditure the Government sought to resist the tendency for wages to increase and refused the application of State employees for higher wages. The fall in the exchange value of the mark completely upset these plans. An extra month's salary and wages had to be granted to State employees as a bonus in order to avoid the appearance of an increase in wages. To indicate the hopelessness of the Government's task, it may be mentioned that during the first part of April only about one-fifth of the expenditure was covered by taxation.

MORE DRASTIC MEASURES

The Government still endeavours to support the exchange value of the mark. After the sudden drop in the exchange rate on April 19, the announcement was made of further measures of a more drastic character. Imports are to be restricted, and the Association of Hamburg Importers has been asked to co-operate with the Government in drawing up a new list of essential articles which can be imported without a license. The notification of foreign exchange holdings is to be made compulsory and a new regulation is soon to be issued in this connection. The most immediate and drastic action was the raising on April 23 of the official discount rate of the Reichsbank from 12 to 18 per cent. It is believed that such a high rate of discount is unprecedented and is double the rate prevailing in any other European country. The following are the successive increases in the Reichsbank discount rate during the past year:—

July 28, 1922	5 to 6 per cent
August 28, 1922	6 to 7 per cent
September 21, 1922	7 to 8 per cent
November 13, 1922	8 to 10 per cent
January 18, 1923	10 to 12 per cent
April 23, 1923	12 to 18 per cent

With the raising of the official discount rate to 18 per cent, the banks adjusted their rates for loans to 20 per cent.

In addition to the above measures the Reichsbank declared its intention of continuing the support of the mark by throwing its reserves of foreign currency on to the market as occasion requires, but in view of recent experience it is doubtful what success these steps will have in the future. A further drop in the exchange value of the mark during the first week of May after the presentation of the German note on reparations shows that the Government is not able any longer to control the situation as successfully as during the previous two months. It is now realized that until a stop is put to currency inflation any efforts at stabilization of the mark are bound to be futile.

REVIVED TRADE

The fall in the exchange value of the mark during April was immediately reflected in a revival of trade for home account and to some extent for export. The panic buying of goods by the public in anticipation of increased prices was present, as is always the case when the mark slumps. The export of many lines, of which the German prices have been too high for the past two months, was made again possible. The result has been a temporary interruption to the industrial slump and to the closing of factories. The latter necessity had been largely obviated by the application of short time in many industries, but it was feared that further increases in unemployment were inevitable.

Prices began to soon adjust themselves to the new level of inflation and applications for increased wages are pending throughout industry, so that unless the mark continues to slump the revival in trade is likely to be of short duration. The wholesale index number of the *Frankfurter Zeitung* for the beginning of May is 8,237 times that of 1914. This is an increase of 28 per cent over that of the previous month and is the highest yet recorded. The following table gives the index numbers for the past five months together with the index for the dollar exchange:—

	Dollar Rate	Wholesale Index
1914	1	1
January	2,045	2,054
February	9,524	7,159
March	5,381	6,770
April	5,024	6,427
May	8,869	8,237

The *Frankfurter Zeitung* points out that the May index number showed increases in the prices of all groups of commodities. The greatest increase, however, was in the textile and leather group, the index for which was 59 per cent higher than in the previous month. This group of commodities is always the most susceptible to exchange fluctuations. The provisions group index increased 31 per cent, and even such purely domestic products as potatoes, rye, and eggs showed considerable increases in price. In the minerals group the index number was 30 per cent higher than in the previous month, and in finished manufactured products the increase was 11 per cent.

THE POSITION IN THE RUHR

During the month of April further measures were introduced by the French and Belgians with a view to more completely isolating the occupied zone from the rest of Germany. It would also appear that more success is attending the efforts of the French and Belgians to transport Ruhr coke to their respective countries. At the beginning of April only a little over 2,000 tons of coke a day were being taken to France, but it would now seem that the daily deliveries to France and Belgium exceed 10,000 tons, although the various estimates are conflicting. At present efforts are being concentrated on deliveries of coke, and only a small quantity of coal has been transported out of the Ruhr, mostly to Belgium. It is stated that 410,000 tons of coke have been seized and are available for shipment. Production, however, is rapidly decreasing, the Germans only working those ovens which are necessary for the operation of the blast furnaces, and it is claimed that 60 per cent of the coke ovens in the Ruhr are now idle.

The cutting off of the Ruhr is inevitably proving a severe strain on German resources. According to the official statistics, the imports of coal from Great Britain during January and February, 1923, amounted to 1,063,321 tons as compared with 214,818 tons in the same months of 1922. It is believed that the actual receipts of coal from Great Britain are larger than the official statistics indicate. Recently considerable quantities of coal have also commenced to arrive from the United States. The occupation of the Ruhr is also having its effect in depriving unoccupied Germany of the iron and steel products formerly obtained from that area. It was recently announced that the German State Railways had placed large orders for steel rails in Czecho-Slovakia and Austria. The deprivation of semi-manufactured iron and steel products from Rhenish-Westfalian works curtails Germany's ability to export finished manufactured goods.

IMPORT TRADE

The trade with Germany in imported articles continues to be restricted, except in the case of essential food products and coal. Manufacturers in view of the prevailing uncertainty are still declining to contract for large supplies of raw materials and are either working up old stocks or buying minimum quantities at a time. It is confidently predicted that if there would be a settlement of the Ruhr conflict in the near future, great quantities of all kinds of raw materials would require to be imported. In the meantime, with a view to controlling the exchanges, the Government has announced further restrictions on imports and the list of articles which may be freely imported is to be revised.

OFFICIAL TRADE STATISTICS

The lastest official trade statistics to be issued are those for the month of February, 1923. The total imports during that month amounted to 3,166,130 metric tons as compared with 4,728,902 metric tons during January and 3,822,970

tons for the monthly average of the year 1922. The total exports amounted to 1,096,110 tons as compared with 1,309,304 tons during January and 1,796,360 tons for the 1922 monthly average.

Of the total imports during February coal accounted for 1,421,830 tons and iron ore for 238,440 tons. The following are some of the principal importations which are likely to be of interest to Canada:—

	Monthly Average 1922 Metric Tons	January 1923 Metric Tons	February 1923 Metric Tons
Wheat	111,650	55,860	52,860
Wheat flour	......	3,109	1,634
Rye	44,970	192,140	75,930
Feed barley, oats	7,550	12,370	2.957
Maize	90,450	55,820	42,450
Sugar	19,590	5,660	4,680
Fish	15,810	4,760	10,315
Wool	17,910	13,490	11,230
Cotton	26,160	31,750	22,300
Flax, hemp, jute	15,000	15,660	15,490
Timber	205,490	390,540	351,650
Coal	1,049,860	1,870,130	1,421,830
Brown coal	167,970	86,830	121,120
Coke	28,970	30,910	16,570
Cement	11,050	4,750	2,800
Iron ore	917,810	795,770	238,440
Copper	18,380	18,090	13,490
Asbestos	......	734	386
Semi-manufactured iron	27,100	36,580	10,610

IMPORTS INTO HAMBURG

The returns of merchandise imported into the Free Port of Hamburg are of more practical interest than the official trade statistics. Below are given the figures for the arrivals at the port during the month of April of flour, wheat, rye, and asbestos. These figures should be of interest to Canadians, but it should be remembered that goods received at the Free Port of Hamburg are distributed throughout Northern and Central Europe and are not all intended for consumption in Germany.

Arrivals at Hamburg Free Port—Month of April, 1923

Flour—		
From United States Atlantic ports	sacks	174.756
	tons	2,055
From United States Pacific ports	sacks	27,235
From Portland, Maine	"	13.602
From Canadian Ports	"	73,762
From Great Britain	"	8,559
From Argentine ports	"	714
	tons	2.655
From Far Eastern ports	sacks	761
From various ports	"	10
	bales	60
Wheat—		
From United States	bushels	264.511
	quarters	1,000
From Argentina	tons	32,843
	sacks	18,837
From Canada	bushels	52,000
From Portland Maine	bushels	41,000
Rye—		
From United States	bushels	568.689
	quarters	5,000
From the Argentine	tons	220
	sacks	2,583
From Russia	tons	16.066
	sacks	1,041
Asbestos—		
From Canada and Portland, Maine	sacks	8.205
From South Africa	"	2,833
From Great Britain	sacks raw	20
	bales	17

TRADE WITH CANADA

Three vessels arrived at Hamburg from Canadian ports during April and landed cargo as follows:—

Flour	sacks	38,609
		14,003
		4,100
		15,750
		1,300
Wheat	bushels	52,000
Asbestos fibre	sacks	480
	"	4,180
Clover seed	sacks	353
Clover screenings	"	291
Wooden cobblers' pegs	cases	98
Wood wool	"	25
Figured birch	blocks	5
Wood	"	44
Lard	cases	1,400
Pickled pigs liver	tierces	100
Animal offal	"	100
Cobalt ore	barrels	32
Cobalt screenings	"	172
Agricultural machinery parts	packages	279
	"	3
Electric articles	cases	3
Copper sample	"	1
Provisions sample	"	1

There would appear to be a fair amount of German goods being shipped to Canada at the present time, among which the principal are toys, glassware, crockery, coal tar dyes, chemicals, drugs, salts, combs, plate glass, wall tiles, scissors, razors, blankets, picture books, drawing instruments, various kinds of machines, etc.

MARKET FOR CANNED GOODS IN CHINA

Trade Commissioner J. W. Ross

Shanghai, April 25, 1923.—Canned food products of various kinds being now so almost universally in demand, it would be remarkable if they did not find a market in China; but as there are no statistics of the value of importations of canned goods into this country in any one year, with the exception of tinned milk—for all are classed in customs returns as household stores—it is impossible to state how great is the market. A visit to the shops will show that a fairly extensive trade is done, and other points to be noted are the great variety of food products which can be obtained in tins, and the number of countries which are concerned in supplying the demand.

EXTENT OF THE MARKET

While it is quite impossible to give accurate figures of the consumption of canned goods in China, yet from observation of the trade, and from the returns given of imports of household stores, a fair estimate for 1921 would be about $2,000,000 Canadian currency. This, however, includes a large volume of food products from Japan, preserved in tins for the consumption of the large Japanese population in the republic. The Chinese are not as yet great consumers of imported canned goods. They are, however, acquiring the taste, and to meet the demand for tinned goods of a class which more directly appeals to the Chinese, a modern factory is now in operation in Shanghai, putting up a variety of food products which are now considered as delicacies by the Chinese people, but would meet with little or no demand in foreign countries. The factory, which is quite modern in its equipment, is fully described below, with

a list of the articles which they turn out. With the exception of jams, which are not yet produced in China, there is not a large consumption of foreign canned food by the Chinese people. It is therefore to the foreign population that we must look as consumers of canned goods in this country, and these, exclusive of Japanese, represent about 100,000 persons all told. For certain reasons, however, there are probably not another 100,000 persons in any other part of the world who apparently are such large consumers of imported goods. This is due to the fact that China does not produce the articles which residents of foreign nationality have been accustomed to at home, so different are the civilizations, and in the case of foodstuffs, particularly of vegetables and fruits, the Chinese products being grown under such insanitary conditions, foreign residents in the country are afraid to eat them, and so turn to the contents of tins.

SOURCES OF IMPORTS AND RACIAL TASTES

Almost every commercial country in the world is concerned in supplying China with canned goods of some description. Japan comes first with food products peculiarly Japanese. Next in order the United States, Great Britain, France, Italy, Holland, Canada, Australia, Straits Settlements, and India.

All foreigners in China use fruits and jams to a fairly equal extent. English people are, however, very partial to jams and marmalade, but in the case of tinned vegetables, the English are quite indifferent, being apparently satisfied with the few vegetables grown in China, such as beans, spinach, and cabbage. They do not appear to be acquainted with the variety of vegetables so much in use in Canada, or how to prepare them. This is partly due to the fact that very little advertising of such articles of food is done in China; it is therefore likely that if more publicity were given to such goods, or an educational campaign attempted, a greater consumption of tinned vegetables would follow. The only article of vegetables which the English show any partiality for is white asparagus. This frequently appears on dinner tables, where it is served as a separate course either hot or cold with mayonnaise dressing. The Americans, on the other hand, are large consumers of vegetables, particularly tomatoes and corn, and as the American element in China is quite large, a considerable demand for canned vegetables exists from this source.

CANNING FACTORIES IN CHINA

China possesses a number of canning factories which are engaged in putting up a great variety of food products, most of which are distinctly Chinese in character, and while several of the kinds are extremely palatable, the great majority of the articles are only suitable for Chinese consumption. Two or three such factories are at Canton, in South China; another is at Foochow; but by far the largest and most important is at Shanghai. Material is plentiful, both in the case of vegetables and meats, this being the most fertile section of China with a vast country tributary to the market from which to draw supplies. The Tai Foong Company was established in 1906. Beginning in a small way, it is now a large concern, employing 150 people and turning out about 2,000,000 cans of food products annually. The products put up consist of the following: sharks' fins, chicken, duck, pork, beef, mutton, fish, pigeons, pheasants, turtle, rice birds, ham, bamboo shoots, fruits, preserves, dried fruits, sausage, biscuits, many of these commodities being prepared with Chinese sauces, flavours and condiments.

The factory is equipped with modern machinery, made in Germany. A cold storage plant in connection with the factory is also in operation, and a can-making department. The daily average output is about 4,000 cans. In

addition to the factory, the company operate retail stores in different ports. That at Shanghai is a large and attractive store in which only the products of the factory are sold. The Tai Foong Company ship their goods to all parts of China, Hong Kong, Manila, Singapore, the Malay States, and even to San Francisco, and they are in much favour among the Chinese of those parts of the world.

PACKING AND SHIPPING

Vegetables and Fruits.—Vegetables and fruits should be packed for export abroad in hermetically sealed tins, known in the trade as 1's, 2's, and 2½'s. The tins should be attractively labelled, giving the name and address of the packers and the contents and weight of the tin. A bright and attractive package should be put up, for the appearance of the outside of the can or jar is regarded as an indication of the quality of the contents, and frequently determines the sale of the goods. A window display of a quantity of bright-looking tins of fruit or vegetables always attracts attention and helps sales.

Jams.—Jams should be packed for the China market in 1-pound tins and in glass jars, the former for transportation to the outports and the interior of the country, and the latter for high-class city trade. Cans of a greater size than 1 pound are not in demand, and are difficult to sell. The cans must be hermetically sealed, for no kind of a closed top has been devised which is air tight, or will stand transportation without some becoming loose, with a consequent leakage of the contents. As in the case of fruits, the labels for jams should be bright and attractive.

Jams in Glass Jars.—This style of package is in demand for high-class city trade. In putting up jams in glass jars care needs to be employed not only in packing but in shipping the goods as well. The screw top cover must always be employed, with a rubber band packing as well. The so-called anchor top has proven to be not secure, and many jars of jam have gone bad where this style of top has been used. English jams are the best packed of any coming into this market. A study of the methods of closing the covers of the containers of English-made jams would be well worth while by Canadian packers.

SHIPPING GOODS

Much complaint against the manner of packing Canadian jams for shipment abroad in glass jars has been received at this office. The greatest fault seems to be in the thin and light character of the wood of which the cases are made, sufficient protection not being given to the contents, with the result that there are a number of broken jars in each case. When owing to imperfect packing the contents of broken jars spread themselves over all the other jars, labels, etc., the buyer is subjected to a great deal of annoyance as well as loss. To avoid all this as far as possible, the following method of packing jams in glass for export should be followed:—

(*a*) Each jar should be so closed as to be air tight and to remain air tight.

(*b*) Each jar should be wrapped in strong paper.

(*c*) A packing device of corrugated paper should line the case, sides, bottom and top, separating each jar one from the other in the same manner as eggs are packed.

(*d*) The packing case should be of wood, sufficiently strong to hold the nails, and also to stand heavy jolts or falls without giving way.

KITCHENWARE REQUIREMENTS OF FRANCE

Trade Commissioner Hercule Barré

Paris, May 9, 1923.—In this line of business a great many of the utensils employed in the average kitchen in France are of French manufacture, and the market for imported goods is thus greatly restricted. Kitchenware manufacturers are well organized, especially those turning out articles in aluminum and copper. Very little of these products have in the past been imported into France. Small quantities have been sent from the United States, but dealers complain that this is of a quality too expensive for the market except for the very small "de luxe" trade. In general the utensils sold are made very plainly and strictly with a view to utility. Cheapness is the first consideration, and as outsiders do not see the kitchen, appearance is not much regarded.

Labour-saving Devices.—Practically none of the many labour-saving devices and detailed refinements which are to be seen in Canadian kitchen utensils are known in France. Some firms interviewed expressed interest when told of such details as spout-filling kettles, handle rests for preserving pans, etc., and said that if introduced there would be a certain demand for them in the better-class trade, but that most of the business at present is in the cheap plain style of goods. The average housekeeper is very conservative in her wants, but there is a steadily increasing demand for articles of utility embodying well-thought-out ideas.

Enamelled Iron.—The utensils most in use in France are made of enamelled iron, brown outside and mottled grey inside. Almost all the utensils in ordinary use are to be obtained in enamelware. The material employed is generally extremely hard and durable; as an example, the writer was shown by a dealer an enamelled frying pan which had been in use by a careful housekeeper for more than forty years. It is in the enamelled iron goods that the greatest opportunity exists for importation from Canada; up to the present no serious attempt has been made to obtain a share of the market. Great attention must be given to price, and the goods should therefore be of the most simple make suited to the ordinary class of trade. It must be realized that there will be strong competition from French firms, and that a better article must be offered without much increase in price.

Aluminium.—Aluminium is becoming very popular, although among the more old-fashioned people a prejudice exists against it as it is said to be hard to clean and inclined to discolour. Its use is gradually increasing, and in many househelds the old enamelled-ware is being replaced by aluminium. Most of the aluminium-ware sold in France is spun or stamped from sheet-metal and is in general much lighter than that used in Canada; cast aluminium is rarely employed except for the larger pots and pans. Since the war many firms have started making aluminium utensils, but it seems that in this line there is little chance of imported articles being able to offer sufficient competition.

Copper.—Some time ago a great many copper vessels were used and sold in this country, but nowadays they are considered too expensive except in high-class kitchens and the market for them is very small. Most housewives have a variety of copper pots which they preserve most carefully and regard as almost too precious to be used except on special occasions. Copper saucepans and pots are generally tin-coated on the inside. Objections are also raised against copper because it stains so easily and is difficult to keep bright and clean.

Nickel.—Nickel utensils are on sale, generally cast solid, but they are not much used, principally because they are too expensive. Plated nickel articles are very rare.

Tin.—There are a quantity of articles sold here in tin, but they are only of the roughest and commonest variety, manufactured in large quantities and solely with a view to cheapness.

Packing.—All kitchen utensils should be packed in nests in large, strong wooden crates, and if plenty of straw is placed around each article there should be no fear of damage.

As has been already stated, a good many of the utensils in use are of special patterns, and some which are universal in Canada are not employed in France. For instance, kettles are only used in Northern France and there is thus very small demand for them; however, small tea-kettles are much sold for the Paris trade, as the afternoon tea habit is becoming very popular. Saucepans are generally made in three weights: light, medium, and heavy. Curiously enough, saucepans and their lids are generally sold separately. Aluminium as the material for saucepans is becoming very popular. Large boiling pots or preserving pans are widely used, generally with two small lifting handles instead of the semi-circular wire one used abroad. The double boiler so much used in Canada has only recently been introduced in France. Frying pans are most commonly made in enamelled iron for the larger sizes and in aluminium for the smaller ones; they are seldom made in iron. Special long oval shapes are made for frying fish. The smaller metal utensils like strainers, ladles, pie and pudding cooking plates, metal plates and cups are made of quite ordinary pattern and need no comment. Many of the makers of aluminium-ware here make replicas of their standard utensils about one-quarter full size for use as children's toys.

To sum up, before attempting to enter the kitchenware market in France a very careful study of conditions is necessary to find out if the articles are suited to the market and whether competition can be met as regards price and quality.

FLAX CULTIVATION IN EGYPT

Eight years ago the Egyptian Government, writes the Cairo correspondent of the London *Times Trade Supplement,* through the Ministry of Agriculture, started experimenting with the cultivation of flax. It was encouraged to do this by the high prices which this product had attained owing to the normal sources of supply having been shut off by the war. This crop was then being cultivated over a very restricted area, only about 1,450 acres being devoted to it, and the experiments were intended to ascertain whether Egyptian or European seed gave the better results and whether flax-growing could be conducted on a commercially profitable scale.

The experiments have proved eminently successful, and the fibre has been declared by the experts to be of excellent quality. Flax produced from Egyptian seed yields a fibre too short and too coarse for the requirements of the foreign market, but these experiments which have been conducted with foreign seed show that from such seed Egypt can produce a flax excellently adapted to European requirements. The Government has been so impressed by the result of these experiments that it has elaborated a scheme for the extension of flax cultivation with European seed. It is arranging that crops shall be marketed under the best auspices, and the Government thus hopes to prove to the fellaheen that flax growing can be made remunerative. The exceptional conditions of climate and water supply in Egypt ensure a steady maximum yield from year to year. There is every prospect therefore that with the advantage of Government encouragement and assistance a considerable impetus will now be given to a crop which will not interfere with cotton but on the contrary should provide the country in time with a very remunerative second fibre crop.

JAMAICA'S COCONUT EXPORTS

F. L. Casserly, Canadian Trade Commissioner's Office

Kingston, Jamaica, May 19, 1923.—In a normal year, Jamaica produces between 25 and 30 million coconuts, most of which are exported in a dried state, in the shell. When the shell is removed, the dried kernel is known as copra, of which also smaller quantities are exported. The destinations to which shipments are made, and the quantities sent to each, are shown by the following tables:—

	1922.	1st Jan.-28th Apl., 1923
Coconuts (No.)—		
United Kingdom	5,063,450	872,050
United States	22,644,006	5,947,790
Canada	2,637,535	588,350
Other countries	49,450	12,600
Total	30,394,441	7,420,790
Copra (lbs.)—		
United Kingdom	760,302	270,800
United States	1,424,358	1,126,691
Canada	nil	nil
Other countries	nil	nil
Total	2,184,660	1,397,491

It will be noted that the United States is by far Jamaica's largest customer. The United States Government, however, some time ago imposed a duty of 50 cents per 100 on Jamaican coconuts, which though not specially discriminative, will certainly tend to restrict Jamaica's business with that country; and the authorities here, in response to representations by Jamaican coconut planters, are considering what steps should be taken to meet the situation.

Canada's purchases are insignificant in comparison, but the 1922 figures show a great increase over those for the previous year, when Canada took only 1,401,029 nuts. Both coconuts and copra from Jamaica are free of import duty in the Dominion, the foreign articles paying respectively 75 cents per 100 and ¾ cents per pound. It is this preference, coupled with the interest aroused amongst Canadian buyers by the Canadian National Exhibition last year—where Jamaican coconuts were on show—which is responsible for Canada's increasing purchases.

The supply is fairly constant, shipments being made all the year round. The only uncertain factor is the possibility of a hurricane in the summer months, which, when it occurs in sufficient intensity, reduces the yield for some time after. Prices tend to rise towards Christmas and Easter, in conformity with increasing demand abroad at those seasons. At present, coconuts are worth 9s. per 100 f.o.b. Kingston.

This product is used chiefly in the manufacture of confectionery, soap and oil. Good business could be done in desiccated coconut with confectioners and other users abroad, but so far coconut desiccation has not been carried on in Jamaica except in a small way.

PAPER IN DEMAND IN CENTRAL AMERICA

Colombia and Venezuela are important markets for paper, Colombia being the busier, with demands for newsprint, book paper, wrapping, boards, and writing paper. In Venezuela writing paper is the principal item, followed by newsprint and book paper.

MARKING OF TINNED FISH FOR ITALY

The Ministerial Order of 1st January last (says the British *Board of Trade Journal*) laying down regulations regarding the importation of animals and animal products into Italy contains a provision (Article 10) to the effect that the receptacles (tins, etc.) of preserved fish must bear in clear and indelible characters an indication of the contents and the name of the producing firm.

In response to an inquiry, the Italian Director-General of Customs states that, under this provision, the receptacles in question must be either stamped or embossed with the name of the firm and the contents, and that labels pasted upon tins are not considered as complying with the regulations. As a temporary measure, in order to give producers time to comply with the new regulations, the importation of tinned fish will be permitted under the present conditions of packing, subject always to a favourable decision of the sanitary authorities, but producers are warned of the necessity of complying, in the shortest time possible, with the new regulations.

[In connection with the above, the Canadian Trade Commissioner in Milan has arranged to cable, when the announcement is made, the date of the coming into force of the new regulations, and this will be duly published in the *Commercial Intelligence Journal.*]

THE ITALIAN IMPORT DUTY ON SUGAR

Mr. A. E. MacEachern, Assistant Trade Commissioner in Milan, writes in amplification of his cable of May 10 regarding the import duty on sugar of the first grade and second grade having been abolished as a temporary measure in Italy (see No. 1007, page 809) as follows:—

The decree is made effective as from May 2, 1923, and sugar which has been shipped from the country of origin prior to this date is not entitled to exemption from duty. The reason for this action on the part of the Italian Government is that there is but a small stock of sugar in the country at the present time, and as the new domestic crop will not be available for at least three months, it is necessary to arrange for importation. Imported sugar was dutiable at the rate of 120 lire per quintal, and the price now being quoted is 380 lire per quintal. As Italian sugar is sold at 305 lire per quintal, the duty formerly levied upon sugar served virtually to prohibit its importation. Canadian firms interested may be referred to Mr. Clarke's report on the Italian sugar situation in *Commercial Intelligence Journal* No. 990 (January 20, 1923). Canadian sugar is favourably known in Italy, and it is estimated that some twelve thousand tons of imported sugar will be required to tide the country over until the new crop is available.

A list of the principal Italian importers of sugar is on file in the Department of Trade and Commerce, Ottawa, and may be obtained by interested Canadian firms on application to the Director, Commercial Intelligence Service (quoting file No. 14666-A).

HIGH GRADE PAPER FROM FLAX

It is reported that a discovery in the manufacture of high grade paper now makes it possible to eliminate the brown stain, which hitherto has confined the use of New Zealand flax to the making of wrapping paper and millboard, and opens up the prospect of utilizing this fibre in the manufacture of higher grades of paper.

OF INTEREST TO FIRMS SELLING CUSTOMS FORMS

The Commercial Intelligence Branch of the Department of Trade and Commerce, for the information of Canadian exporters, has issued several leaflets dealing with the customs regulations of British and foreign countries in regard to invoices, certificates of origin, etc., required for goods imported into such countries. It is quite practicable in many instances for Canadian exporting firms to print their own invoice forms and necessary accompanying declarations from the information given in these leaflets. Sometimes, however, the exporter would find it more convenient and economical to purchase a number of blank forms already printed. Consequently the Commercial Intelligence Branch is occasionally asked where blank forms may be obtained for actual use in preparing the necessary documents to cover shipments of Canadian goods sent abroad. It is desired to assist firms making inquiries of this kind. Commercial stationers and others therefore who are offering for sale any of the forms in question are invited to send their names and addresses to the Director, Commercial Intelligence Service, Ottawa, specifying the form or forms they are in a position to furnish. In doing so, quote file No. 24872.

FURTHER RESOLUTIONS AFFECTING CUSTOMS TARIFF*

The Special War Revenue Act, 1915, and Amending Acts

Herewith is printed the provisions of the further Resolutions affecting the Customs Tariff and The Special War Revenue Act, 1915, and Amending Acts, introduced in Parliament 23rd May, 1923, and held to be in effect on and after the dates hereinafter mentioned:

(A) Customs Tariff changes in effect on 12th May, 1923, in respect of goods imported or taken out of warehouse for consumption on and after that day, and goods previously imported for which no entry for consumption was made before that day.

(B) Changes in Special War Revenue Act, 1915, and Amending Acts, in effect as follows:

Repeal of Excise Tax on confectionery and beverages in effect 1st June, 1923.

Excise Tax on carbonic acid gas in effect 1st June, 1923.

Manuscript; raw furs; wool not further prepared than washed; earthen drain tiles for agricultural purposes; exempt from Sales Tax, in effect 1st June, 1923.

Reduction in maximum amount of stamp tax payable on cheques, etc., *vide* resolutions 11th May, 1923, page 9, Memo. No. 32, in effect from the date when the Bill founded on the resolution is assented to.

Amendment respecting stamp tax on receipts in effect from same date. The effect of this is to cancel from such date the regulations in circulars Nos. 237-C and 237-C Supplement B, as respects receipts by or on postcards, form letters, and letters, and such forms of receipts will then be subject to the tax.

The new Consumption and Sales Tax of 6 per cent, *vide* Resolution No. 3 of Resolutions of 11th May, 1923, and Resolutions Nos. 7, 8 and 10 as contained herein, shall come into force on 1st day of January, 1924.

Note.—The punctuation of the second paragraph of Resolution No. 1 (Section 5 of the Customs Tariff), Memo. No. 32, is corrected by the placing of a semicolon after the word "alcohol" in the third line thereof.

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* Note.—The Dominion of Canada Tariff Changes, 1923-24, as introduced in Parliament on May 11, 1923, were published in *Commercial Intelligence Journal* No. 1007 (May 19, 1923).

WAYS AND MEANS RESOLUTIONS

Proposed Amendments to Resolutions of May 11, 1922

CUSTOMS TARIFF

1. That Resolution No. 3 of May 11th, 1923, relating to amendments to Schedule A to The Customs Tariff, 1907, be amended by adding thereto the following provision:

That tariff item 581, the enumerations of goods and the several rates of duties of Customs set opposite said item be struck out of said Schedule A and that the following items, enumerations and rates of duty be inserted in said Schedule A:—

Tariff Item	——	British Preferential Tariff	Intermediate Tariff	General Tariff
384b	Rolled iron or steel hoop, band, scroll or strip, in the coil, number ten gauge and thinner, when imported by manufacturers for use in their own factories in the manufacture of cold rolled iron or steel.......	Free	Free	Free
581	Velvets, velveteens, silk velvets, plush and silk fabrics..	$17\frac{1}{2}$ p.c.	30 p.c.	35 p.c.

2. That said Resolution No. 3 be amended by striking out of tariff item 134 the following words at the end of the said item:

> "Provided further that sugar imported under this item shall not be subject to special duty when the home consumption value at the place of shipment direct to Canada is more than eight cents per pound."

and by inserting at the end of the said item the following words:

> "Provided further that sugar imported under this item shall not be subject to special duty in excess of three-fourths of one cent per pound."

and by striking out of said Resolution No. 3 tariff items 242, 267*b*, 583*c*, the several enumerations of goods respectively and the several rates of duties of Customs, set opposite each of said items, and by substituting therefor the following items, enumerations and rates of duty:—

Tariff Item		British Preferential Tariff	Intermediate Tariff	General Tariff
242	Dry red lead, orange mineral and zinc white.......	Free	5 p.c.	5 p.c.
267b	Crude petroleum not in its natural state, ·7900 specific gravity or heavier at 60 degrees temperature, when imported by oil refiners to be refined in their own factories, per gallon....................	3-10 cent	4-10 cent	$\frac{1}{2}$ cent
583c	Artificial silk fabrics or artificial fibre silk fabrics produced from a form of cellulose obtained by chemical processes or of which artificial silk or artificial fibre silk is the component part of chief value, n.o.p..............................	$17\frac{1}{2}$ p.c.	30 p.c.	35 p.c.

3. That Resolution No. 4 of May 11, 1923, relating to amendments to Schedule B to The Customs Tariff, 1907, be amended by striking out of said Resolution No. 4 tariff item 1031, the enumeration of goods and rate of drawback of Customs duties set opposite the said item and to provide that the following item, enumeration and rate of drawback of Customs duties be inserted in said Schedule B:—

Tariff Item	Goods	When subject to drawback	Portion of Duty (Not including Special Duty or Dumping Duty), Payable as Drawback
1031	Artificial silk yarns, filaments, threads or twists enumerated in Tariff items 583a and 583b....	When imported by manufacturers to be further manufactured in their own factories before the first day of July, 1924..................	60 p.c.

SPECIAL WAR REVENUE

1. That the Resolutions of May 11th, 1923, relating to amendments to The Special War Revenue Act, 1915, be amended by striking out of the said Resolutions subsection (2) of Resolution No. 3, and substituting therefor the following:

"(2) A wholesaler or jobber who sells not less than fifty per cent of his total sales of goods to a licensed manufacturer or producer to be used in articles to be produced for sale, may be granted an annual license, the fee therefor not to exceed two dollars. Such licensed wholesaler or jobber shall give security that he will keep proper accounts and render true statements of sales to licensed manufacturers or producers and pay any tax imposed by the said Act."

2. That the said Resolutions be amended by striking out paragraph (*b*) of subsection (7) of Resolution No. 3 and substituting therefor the following:

"(*b*) To a licensed manufacturer or producer or a licensed wholesaler or jobber in respect of goods on hand on the first day of January, 1924, and which are to be used in the production of articles for sale, no refund to be allowed in respect of goods on hand after the thirty-first day of March, 1924; or"

3. That the said Resolutions be amended by striking out Resolution No. 5 and substituting therefor the following:

"5. That Schedule II to the said Act be amended by striking thereout the item respecting beverages and by adding to the said Schedule the following item:

'carbonic acid gas, per pound........ one cent.'"

4. That the said Resolutions be amended by striking out Resolution No. 7 and by adding thereto the following resolutions:—

"7. A deduction on account of the sales tax may be granted in respect to goods sold at a price fixed by bona fide contract of sale made before the twelfth day of May, 1923, and still in force at the time of delivery of the goods: provided that such deduction shall not exceed the difference between the amount of the sales tax calculated at the rate in force on the eleventh day of May, 1923, and the amount of the consumption or sales tax paid or to be payable under the provisions of these Resolutions, and that no such deduction shall be made in respect of goods delivered after the thirty-first day of March, 1924, and claims for such deduction must be presented to the Department of Customs and Excise with complete evidence on or before the 30th day of June, 1924, otherwise the same shall be rejected."

"8. That paragraph 4 of subsection (1) of Section nineteen BBB of The Special War Revenue Act, 1915, as enacted by Chapter forty-seven of the Statutes of 1922, being the list of excepted articles not liable to tax, be amended by striking out the words

"job printed matter produced and sold by printers or firms, whose sales of job printing do not exceed ten thousand dollars per annum."

"9. That said paragraph 4, of subsection (1) of Section nineteen BBB of The Special War Revenue Act, 1915, being the list of excepted articles not liable to tax be amended by adding thereto the following items:

"manuscript; raw furs; wool not further prepared than washed; earthen drain tiles for agricultural purposes."

"10. That said paragraph 4 of subsection (1) of Section nineteen BBB of The Special War Revenue Act 1915, being the list of excepted articles not liable to tax, be amended by adding thereto the following item:

'syrups enumerated in Customs Tariff item 140;'"

11. That any enactment founded on Resolutions Nos. 4 and 5, of the Resolutions of May 11, 1923, and on Resolution No. 9 as proposed to be added thereto, shall come into force on the first day of June, 1923; and any enactment founded on Resolutions Nos. 1 and 6 of the Resolutions of May 11, 1923, shall come into force on the day of the passing of such enactment; and any enactment founded on Resolution No. 3 of the Resolutions of May 11, 1923, and on Resolutions Nos. 7, 8 and 10 as proposed to be added thereto, shall come into force on the first day of January, 1924.

It is very important that a set of documents accompany each export shipment. If this is not possible, it is most essential that the documents be despatched by first mail in order that they may be in the hands of the consignee before the goods arrive.

AUSTRALIAN CUSTOMS DECISIONS

C. Hartlett, Office of the Trade Commissioner

Melbourne, Australia, April 23, 1923.—Under recent by-laws issued by the Department of Trade and Customs the following are added to the list of material and articles which may be imported into Australia at reduced rates of duty if used in the manufacture of specified goods, or for specified purposes within the Commonwealth:—

MATERIAL AND MINOR ARTICLES FOR USE IN THE MANUFACTURE OF THE UNDERMENTIONED GOODS WITHIN THE COMMONWEALTH

(Provided security is given by the owner that such will be used for that purpose only, and that evidence of such use be given to the satisfaction of the Collector within six months, or such further time as the Collector may allow, after delivery by the Customs)

Plates (including handle plates), D rings, bolts (except attache case pin bolts), clamps (except suit case clamps), locks and studs, for use in the manufacture of bags, portmanteaux, trunks, etc.

Bricks, carborundum refractory, for use in lining furnaces.

Pig iron, for use in manufacture of high-grade steel castings.

Steel tubing, rolled in various sections to take the glass, not exceeding $1\frac{1}{16}$ inches by $\frac{5}{8}$ inch, for use in manufacture of motor car windshields.

Sulphur, for use in manufacture of superphosphates and sulphuric acid.

Nails, mop, for use in manufacture of mops.

Magnetos, and trolley wheels (pressed steel) for use in manufacture of motor gang cars.

Lacing cord, and tin tags, for use in manufacture of corset laces.

Plates, monel metal, for use in manufacture of metalware and for general purposes.

Plates and rivets, steel, for use in manufacture of flexible couplings.

Gum, benzoin, for use in manufactue of medical preparations.

Rods, wire, for use in manufacture of fencing wire or for wire for wire netting.

Beading, cart saddle, not including nickel-plated beading.

Steel, spring, for use in manufacture of springs for gramophones.

Knobs, range, spiral, composed of cast iron, wrought iron or steel wire, range pins, and glass panels, for use in manufacture of cooking stoves.

Metal, pattern makers', composed of approximately 80 per cent lead, 10 per cent tin with other ingredients, for pattern cutting in manufacture of cooking stoves.

Blanks, soundboard and bridge, for use in manufacture of pianos.

Sheets, nickel-plated zinc, for use in manufacture of nameplates, labels, and general purposes.

Tubing, fibre, for use in manufacture of ferrules.

Aluminium strips for use in manufacture of metalware and for general purposes.

Compound iron and steel, for use in manufacture of planer knives.

Carbon black, for use in manufacture of paints and for general purposes.

Wire, iron and steel, for use in manufacture of mattress wire.

Canvas, painted, for use in manufacture of bags, trunks, etc.

Bars, steel, ribbed diagonally, for use in manufacture of agricultural implements.

Zinc dust, for use in manufacture of zinc.

Motors, electric, for use in manufacture of talking machines.

Plate glass (unmounted) bevelled or otherwise, not exceeding 2 inches in diameter or 2 inches square, and other glass not exceeding 3 inches in diameter or 3 inches square, for use in manufacture of ladies handbags.

MACHINES, MACHINE TOOLS, ETC.

(But not the motive power, engine combination, or power connections, of any when not integral parts of the exempt machines)

Fruit juice extractors, electrically driven

Circular saw guides and rounders.

Lithotex plant used in connection with lithographic printing, consisting of projector, step and repeat machine, and printing down machine.

Polishing bobs or wheels, glazing and buffing, of wood covered with walrus hide or similar leather.

Embroidery machines, power.

Polishing machines, cutlery, double-headed.

Planing and thicknessing machines (heavy duty) weighing two tons and over; also panel planing and thicknessing and surfacing and thicknessing machines of same size.

Seeders, raisin, other than for household use.

Insulators, pin type (excluding steel pin), and strings of suspension units complete with ironwork, suitable for use on transmission lines of 33,000 volts or over.

Sand papering machines.

Turning machines, engine, with oval and round chuck and pencil attachment for use in chasing designs on jewellery and other metal goods.
Broaching machines.
C[illegible] machines, [illegible], and sweding machines for corset making.
Tagging machines for placing tin tags on corset laces.
Engines, [illegible] Diesel.
Flanging machines, flue.
Weighing machines, automatic, used in connection with packing of granular and powder substances, including tea.
Key seating machines.
Pill-making machines with one pair of cutting drums ane one set of oval shaper rings.
Lathes, sliding, surfacing, and screw-cutting (also known as self-acting or engine lathes), having movable tailstocks.
Planing and moulding machines, designed to work on timber over 14 inches in width.
Cropping machines, joist.
Cutting machines, guillotine, both hand lever and geared.
Meters (boilers) for recording steam, water and air flow and flue gas and superheater temperatures.
Packing machines, for enclosing in tape form medicinal tablets, confectionery, and similar goods.
Riveting machines, hydraulic, pneumatic, and mechanical.
Sand slinger machines, for use in iron foundries.
Whaling lines, and forerunners for whaling purposes; also rubber wads for guns for whaling.
Burners, gas, Keith patent, for use in gas fired ovens.
Charges, battery, being valve-type rectifiers depending for their operation on the use of a heated anode and positive target.
Formers, wool hat.
Rolls, for use in rolling steel and iron bars, beams, channels, joists, rails and the like.
Mortice chains with links and bars (not transmission) for use on timber mortising machines.
Assembling machines, sheet metal, with automatic guiding attachment, for use in motor building.
Dynamometers, for testing B.H.P. of engines and electric motors.
Reeling machines, automatic, for use in connection with paper coating plants.
Wiring and edging machines, sheet metal, with wiring and Uing attachments, for use in motor body building.
Card mounting machines, textile working.
Gauges, recording liquid level (miscellaneous), for automatically recording depths and rates of flow of water or other liquid in rivers, canals, reservoirs, etc., also volumes of liquids in tanks.
Stripping machines (bookbinding) for applying strips of paper or cloth to the backs of books, etc.

TOOLS OF TRADE FOR ARTISANS AND MECHANICS AND TOOLS IN GENERAL USE

(When not wholly made of wood, and not being machines)

Blocks, setting and levelling (sawmakers').
Champs, saw.
Filers, handsaw.
Hammers, including pneumatic (hand) but not including sawmakers' square-faced and round-faced hammers.
Rakers, gauging swage (sawmakers').
Band saw sets.
Straight edges, steel, sawmakers'.
Swages, saw, with bench attachments.
Tables, levelling (sawmakers').
Chain tool, being a combination tool consisting of hammer screw-driver, punch and chain rivet extractor, mainly used by motor-cyclists.
Extractors, chain rivet, for removing rivets from motor-cycle chains.
Harpoons, for whaling purposes.
Knives, flencing, for whaling purposes.

The above specified minor articles, machine tools and parts, and tools of trade, are now admitted (for the purposes specified) free of duty if from the United Kingdom and at the rate of 10 per cent ad valorem if from any other country.

POSTPONED AUSTRALIAN CUSTOMS DUTIES

Mr. C. Hartlett, Office of the Canadian Trade Commissioner in Melbourne, writes under date April 23, 1923, that the Commonwealth Minister of Trade and Customs has announced that the operation of the deferred duties imposed on the undermentioned tariff items has been further postponed until the date specified opposite each item:—

Item 197 (B)—Cutlery, spoons, and forks, n.e.i., and knife sharpeners.........................September 30, 1923.
Item 334 (F)—(1) Writing and typewriting paper (plain), not including duplicating in sheets not less than 16 x 13 inches.. .. ..January 1, 1924.

(See also *Commercial Intelligence Journal* No. 1003: April 21, 1923, page 653.)

MAILS TO WEST INDIES, CENTRAL AND SOUTH AMERICA

The Post Office Department has furnished a table of sailings from which the following information for the guidance of Canadian firms writing to these areas has been compiled:—

Correspondence for the West Indies is forwarded by direct Canadian steamers or via New York, whichever route will give a quicker despatch, although letters marked for transmission by either route are forwarded in accordance with the endorsation.

Letters for Central America are forwarded via New York, with the exception of letters for British Honduras specially addressed "Via Halifax."

Letters for South American countries generally are also forwarded via New York, unless specially addressed "Via Halifax."

Following are sailings for the month of June:—

For	June
Antigua	7-14-21-28.
Argentina	2, 9, 15, 23, 30.
Bahamas	1, 15, 29.
Barbados	7, 14, 21, 28.
Bermuda	2, 9, 16, 27.
Bolivia and Chile	5, 8, 9, 14, 15, 25, 28 and every Wednesday and Saturday.
Brazil, North	10, 14, 17, 18, 22, 30.
Brazil, South	9, 23, 30.
Colombia	5, 9, 15, 19, 25, and every Wednesday and Saturday.
Costa Rica	Every Saturday.
Cuba	1, 8, 15, 22, 23, 29 and every Saturday.
Curacao	7, 14, 21, 28.
Dominica	7, 14, 21, 28.
Dominican Republic	2, 5, 12, 16, 19, 20, 27, 30.
Ecuador	2, 9, 14, 15, 23, 25, 28.
Haiti	5, 7, 12. 14, 15, 19, 21, 25, 26, 28.
Honduras	2, 5, 8, 9, 14, 15, 16, 23, 25, 28, 30, and every Wednesday and Saturday.
British Honduras	2, 16, 30.
Guiana	5, 7, 13, 15, 21.
Guatemala	2, 9, 16, 30.
Jamaica	2, 5, 8, 16, 19, 22, 30, and every Wednesday.
Martinique	7, 12, 21, 26.
Mexico	Every Thursday.
Nicaragua	5, 9, 14, 15, 23, 25, 28.
Panama and Canal Zone	5, 15, 23, 25, and every Wednesday and Saturday.
Paraguay	2, 9, 15, 23, 30.
Peru	5, 8, 9, 14, 15, 23, 25, 28, and every Wednesday and Saturday.
Porto Rico	2, 9, 16, 23, 30, and every Saturday.
Salvador	2, 5, 8, 9, 14, 15, 16, 23, 25, 28, 30, and every Wednesday and Saturday.
St. Kitts-Nevis	7, 14, 21, 28.
Trinidad	5, 7, 13, 14, 21, 28.
Turk's Island	2, 5, 12, 19, 20, 27.
Uruguay	2, 9, 15, 23.
Venezuela	2, 7, 9, 14, 16, 21, 23, 28, 30.

CONDITION OF ITALIAN MACHINERY MARKET

Opportunities for the introduction of foreign-made electrical machinery into Italy have never been greater than at present, according to a special article from Genoa, sent to the *Birmingham* (England) *Post.* Owing to the almost entire absence of British or American electrical materials from the Italian market, Germany is regaining its pre-war trade in this class of goods, which amounted to 60 per cent of the electrical machinery required annually by Italy. Hydro-electric energy is being applied throughout Italy to railways, factories, and agricultural uses, and Government aid is being given to the more urgent projects.

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain.	†*Aquitania*	New York	June 12
" " "	†*France*	New York	" 13
" " "	*Megantic*	Montreal	" 16
" " "	†*Mauretania*	New York	" 19
" " "	.*Melita*	Montreal	" 20
" " "	*Montclare*	Montreal	" 22
" " "	:*Empress of France*	Quebec	" 23
" " "	*Doric*	Montreal	" 23
Ireland only	‡*Marburn*	Montreal	" 21
Union of South Africa	**New Brighton*	Montreal	" 15
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela	*Caraquet*	Halifax	" 22
St. Kitts, Antigua, Barbados, Trinidad, Demerara	**Can. Runner*	Montreal	" 13
Bermuda, Bahamas, Jamaica, Colombia, British Honduras	**Can. Forester*	Montreal	" 14
Cuba, Jamaica and Colombia	**Otter*	Halifax	" 9
China and Japan	*Empress of Asia*	Vancouver	" 14
" "	*President Madison*	Victoria	" 19
" "	*Africa Maru*	Victoria	" 22
Australia and New Zealand	‡*Maunganui*	San Francisco	" 15
Australia only	*Sonoma*	Vancouver	" 26

† Letter mail only. * Parcel Post and specially addressed correspondence only.

‡ Letter and Paper mail only. - Papers, Parcel Post and specially addressed correspondence only.

The *Melita* and *Empress of France* will also be used for direct mail for the Continent, including direct Parcel Post to France.

EXPORT MARKET CONDITIONS FOR GROCERIES AND CANNED GOODS

The London *Times Trade Supplement,* in reviewing new channels for British export trade in groceries and canned goods, notes that on many articles substantially lower rates have been quoted—in some instances the cuts have amounted to 25 per cent—and the effect has been to attract a certain amount of new business. While there has been a slight decline in orders for biscuits and jams, this has been more than counterbalanced by increased demand for sugar, confectionery, cocoa, and some classes of canned goods. The re-export trade in tea maintains its recent recovery, but the coffee trade is without new feature. It would seem, however, that on the whole the turn of the pendulum has come and that there is a prospect of brighter trade. Particularly is this so for canned goods, both vegetables and fruits.

POINTS OF THE TRADE COMPASS

General exports from Austria are now rapidly increasing, and London credits are being re-established. Austrian imports of foodstuffs are beginning to recover, particularly those of canned meats, condensed milk, and other preserved foods. In the neighbouring Succession States the outlook is not so good. There is some call for cereal foods in Switzerland, where there is also quite a spurt in the demand for tobacco.

In Cuba, where the sugar industry is flourishing, there is a demand for large quantities of condensed milk, fancy cheese, canned fruits and vegetables, pickles, and condiments. This market is worth attention, notwithstanding the predominant position which the United States holds in the island. Even from

Peru there is a call for suitably packed foods *de luxe*. Toilet articles, notably fancy soaps, also are much wanted. In New Zealand conservative buying has characterized the grocery trade for some time. Price cutting there does not lend confidence to the trade. Potted and canned meats and fish are, however, meeting with a big demand, sales being largely helped by the lower prices ruling this season. News from Australia is that pepper, whiting, shellac, matches, almonds, desiccated coconut and ginger in liquid figure most prominently, although there is a substantial demand for most grocery goods.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING MAY 29, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement of the nominal closing quotations for all the principal exchanges for the week ending May 29, 1923. Those for the week ending May 22 are also given for the sake of comparison.

		Parity	Week ending May 22, 1923	Week ending May 29, 1923
Britain.. .. .. £	1.00	$4.86	$4.7323	$4.7295
France.. .. .. Fr.	1.	.193	.0680	.0676
Italy.. .. .. Lire.	1.	.193	.0492	.0489
Holland.. .. .. Florin.	1.	.402	.4002	.4005
Belgium.. .. .. Fr.	1.	.193	.0586	.0580
Spain.. .. .. Pes.	1.	.193	.1560	.1557
Portugal.. .. .. Esc.	1.	1.08	.0485	.0486
Switzerland.. .. .. Fr.	1.	.193	.1848	.1847
Germany.. .. .. Mk.	1.	.238	.000018	.000017
Greece.. .. .. Dr.	1.	.193	.0204	.0217
Norway.. .. .. Kr.	1.	.268	.1659	.1694
Sweden.. .. .. Kr.	1.	.268	.2730	.2722
Denmark.. .. .. Kr.	1.	.268	.1896	.1895
Japan.. .. .. Yen	1.	.498	.5016	.5014
India.. .. .. R.	1.	2s.	.3191	.3198
United States.. .. .. $	1.	$1.00	1.0212	1.0234
Mexico.. .. .. $	1.	.498	.4965	.4976
Argentina.. .. .. Pes.	1.	.424	.3689	.3607
Brazil.. .. .. Mil.	1.	.324	.1072	.1061
Roumania.. .. .. Lei	1.	.198	....	....
Jamaica.. .. .. £	1.	4.86	4.7462	4.7461
British Guiana.. .. .. $	1.	1.		
Barbados.. .. .. $	1.	1.		
Trinidad.. .. .. $	1.	1.		
Dominica.. .. .. $	1.	1.		
Grenada.. .. .. $	1.	1.	.9829—.9825	.9835—.9831
St. Kitts.. .. .. $	1.	1.		
St. Lucia.. .. .. $	1.	1.		
St. Vincent.... .. .. $	1.	1.		
Tobago.. .. .. $	1.	1.		
Shanghai, China.. .. .. Tael	1.	.708	.7697	.7675
Batavia, Java.. .. .. Guilder	1.	.402	.3906	.3914
Singapore, Straits Settlements... $	1.	.567	.5591	.5590

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "THE COMMERCIAL INTELLIGENCE BRANCH OF THE DEPARTMENT OF TRADE AND COMMERCE, OTTAWA," OR THE BOARDS OF TRADE AT ST. JOHN, HALIFAX, QUEBEC, SHERBROOKE, MONTREAL, PETERBOROUGH, TORONTO, WOODSTOCK, ST. MARY'S (ONT.), WINNIPEG AND VANCOUVER; THE CHAMBERS OF COMMERCE AT HAMILTON, ST. CATHARINES, STRATFORD, BRANTFORD, LONDON, AND VICTORIA (B.C.); BORDER CHAMBER OF COMMERCE, WINDSOR; THE CANADIAN MANUFACTURERS' ASSOCIATION OFFICES AT TORONTO, MONTREAL, WINNIPEG, VANCOUVER AND VICTORIA; AND THE KITCHENER AND WATERLOO MANUFACTURERS' ASSOCIATION, KITCHENER, (ONT.).

Foodstuffs

1665. WHEAT FLOUR.—A commission merchant of Cienfuegos, on the south coast of Cuba, wishes to obtain the agency of a Canadian wheat flour mill, to represent it in that area. Guarantees a monthly consumption of from 1,000 to 1,200 sacks.

1666. BARLEY AND CHEESE.—A Belfast produce broker desires to get in touch with reliable Canadian exporters of barley and cheese.

1667. POWDERED MILK.—A foreign import firm in Yokohama desire to hear from Canadian manufacturers of powdered milk, particularly skimmed milk powder. Samples and quotations requested immediately.

1668. CANNED FOODS.—A Belgian agent for food specialties desires connections with Canadian houses exporting canned foods, particularly fruits.

1669. CANNED PILCHARDS.—An established agent in Singapore wishes to receive c.i.f. quotations and samples of canned pilchards. To be packed in tomato sauce or oil in flat ovals, 15 oz. net. Price $9 (Straits currency) or under, per case of 48 tins.

1670. CANNED GOODS, CEREALS, ETC.—A French firm wish to secure the representation for Havre of Canadian exporters.

1671. SALTED SALMON.—A Japanese firm specializing in the import of fish products desire to hear from Canadian houses in a position to supply salted salmon and salmon eggs or roe. Prices and full particulars requested immediately.

Miscellaneous

1672. CHEMICALS.—A concern in Turin interested in doing business with Canada would like to receive offers from Canadian exporters of chemicals.

1673. CHEMICALS AND RAW MATERIALS FOR INDUSTRIES are requested by a Genoa firm.

1674. HEAVY CHEMICALS FOR INDUSTRY.—A Turin company would like to import from Canada.

1675. INDUSTRIAL CHEMICALS, NITRATE OF SODA AND COAL.—A firm in Milan would like to communicate with Canadian houses handling the foregoing.

1676. INDUSTRIAL CHEMICALS.—A Milan firm handling industrial chemicals would like to be put in touch with Canadian houses exporting industrial chemicals.

1677. BRONZE POWDER.—A Liverpool firm ask for quotations on bronze powder.

1678. CARBON BLACK.—A Liverpool firm ask for quotations on carbon black.

1679. CARPETS.—A Singapore house desires to hear from Canadian exporters of small carpets. Sizes, 12 by 9 or thereabouts, art colours, broad designs.

1680. WARDROBE TRUNKS.—A departmental store in Singapore would like to hear from a Canadian firm prepared to ship wardrobe trunks. Price around $25 to $35 (Canadian currency) f.o.b. Toronto.

1681. EARTH AUGERS.—Quotations will be received for standard earth augers, sizes 8 inches, 9 inches, and 10 inches.

1682. CUT GLASS.—An old-established house in Singapore wishes to form a connection with a Canadian exporter of cut glass. Deep cut and heavy is most favoured.

1683. RAILWAY SUPPLIES AND SHIP'S TACKLE.—A prominent merchant house in Bombay wishes to receive c.i.f. Bombay quotations on the following goods:—American rail devices such as rail joints, anchor plates, automatic couplers; also ship's tackle, pulley blocks, bolts, and a high-class enamel for interior decoration similar to "Paripan."

1684. MODEL MOTOR CARS.—A Singapore general store wish to receive quotations on children's model motor cars.

1685. WOODEN SHOE SHANKS.—A London firm invite quotations from Canadian manufacturers of wooden shanks for boots and shoes.

1686. WOODENWARE.—Quotations are wanted by a Birmingham firm, who desire the exclusive agency of a Canadian factory for shovel stems, pick handles, broom handles, D handles, blind rollers, slasher mattock and sledge handles. See report on page 886.

1687. BEECH AND BIRCH TIMBER.—A London firm wish to get into communication with Canadian shippers of beech or birch timber suitable for brush and broom stocks. The material would be required for direct shipment to a brush factory in Australia.

1688. BIRCH.—A leading Hamburg firm of lumber merchants is open to receive offers for first class figured Canadian birch logs large enough for the manufacture of veneers.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From Montreal

To Avonmouth.—Cabotia, Anchor-Donaldson Line, June 9; Turcoman, June 9; Colonian, June 16—both of the White Star-Dominion Line.

To Liverpool.—Montrose, Canadian Pacific Steamships, Ltd., June 8; Lakonia, Cunard Line, June 8; Regina, White Star-Dominion Line, June 9; Bosworth, Canadian Pacific Steamships, Ltd., June 9; Ausonia, Cunard Line, June 9; Corinaldo, Cunard Line, June 15; Doric, White Star-Dominion Line, June 16; Megantic, White Star-Dominion Line, June 16; Montclare, Canadian Pacific Steamships, Ltd., June 22.

To London.—Canadian Planter, Canadian Government Merchant Marine, Ltd., June 6; Brant County, I.C. Transports, Ltd., June 8; Bosworth, Canadian Pacific Steamships, Ltd., June 9; Vardulia, Cunard Line, June 9; Bredon, Canadian Pacific Steamships, Ltd., June 16; Appomattox, Furness Line, June 16; Ausonia, Cunard Line, June 16.

To London and Antwerp.—Canadian Commander, June 6; Canadian Conqueror, June 20—both of the Canadian Government Merchant Marine.

To Southampton.—Minnedosa, Canadian Pacific Steamships, Ltd., June 6; Empress of Scotland, Canadian Pacific Steamships, Ltd., June 9; Manchester Corporation, Manchester Lines, Ltd., June 21.

To Manchester.—Manchester Hero, Manchester Lines, Ltd., June 7.

To Cardiff and Swansea.—Canadian Leader, June 15; Canadian Challenger, June 29—both of the Canadian Government Merchant Marine.

To Newcastle and Leith.—Cairntorr, Thomson Line, June 8; Cairnross, Thomson Line, June 15.

To Dundee and Hull.—Wyncote, Furness-Withy Line, June 5; Cornish Point, Furness-Withy Line, June 19.

To Glasgow.—Metagama, Canadian Pacific Steamships, Ltd., June 7; Athenia, Anchor-Donaldson Line, June 8; Saturnia, Anchor-Donaldson Line, June 15.

To Belfast.—Torr Head, Head Line, June 5; Melmore Head, Head Line, June 17.

To Dublin.—Ramore Head, Head Line, June 22.

To Cork.—Carrigan Head, Head Line, June 3.

To Havre.—Brant County, I.C. Transports, Ltd., June 8; Hastings County, I.C. Transports, Ltd., June 18.

To Antwerp.—Minnedosa, Canadian Pacific Steamships, Ltd., June 6 Canadian Planter, Canadian Government Merchant Marine, Ltd., June 6; West Campgaw, Rogers & Webb, June 15.

To Rotterdam.—Lisgar County, I.C. Transports, Ltd., June 14; Fanad Head, Head Line, June 24.

To Rotterdam and Hamburg.—Fanad Head, Head Line, June 24.

To Hamburg.—Empress of Scotland, Canadian Pacific Steamships, Ltd., June 9; Lisgar County, I.C. Transports, Ltd., June 14; West Campgaw, Rogers & Webb, June 15.

To Norwegian Ports.—Fordefjord, Norwegian-American Line, July 15; a steamer, Norwegian-American Line, July 14.

To Copenhagen.—Arkansas, Scandinavian-American Line, about June 20.

To Copenhagen, Gothenburg, Christiania, Helsingfors and Other Scandinavian and Baltic Ports.—Arkansas, June 10; Florida, June 30—both of the Scandinavian-American Line; Aledo, Sprague Lines, June 15.

To St. John's (Nfld.), via Charlottetown.—Canadian Sapper, Canadian Government Merchant Marine, June 21.

To St. John's (Nfld.).—Canadian Sapper, Canadian Government Merchant Marine, June 5 and 26, and fortnightly sailings.

To New Zealand and Australia.—Doonholm, New Zealand Steamship Co., June 16; Canadian Cruiser, Canadian Government Merchant Marine, June 26.

To South American Ports: Rio de Janeiro, Santos, Montevideo, and Buenos Aires.—Hesperia, June 10; Hilarius, June 20—both of the Houston Lines.

To South Africa.—New Brighton, June 15.

To Bermuda, Barbados, Trinidad and Demerara.—Bedwyn, Canadian Pacific Steamships, Ltd., June 9—via Sydney, N.S.; Borden, Canadian Pacific Steamships, Ltd., June 23.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—Canadian Forester, Canadian Government Merchant Marine, June 14.

To St. Kitts, Antigua, Barbados, Trinidad and Demerara.—Canadian Runner, June 13; Canadian Squatter, June 27—both of the Canadian Government Merchant Marine.

From Quebec

To Liverpool.—Regina, June 9; Megantic, June 16—both of the White Star-Dominion Line.

To Hamburg.—Empress of Scotland, Canadian Pacific Steamships, Ltd., June 9.

From North Sydney, N.S.

To Newfoundland.—Kyle, Newfoundland Government Railway Commission, tri-weekly (Tuesday, Thursday and Saturday).

To St. John's, Nfld. (via Charlottetown, P.E.I.).—Canadian Sapper, Canadian Government Merchant Marine, June 21.

From Halifax

To Bermuda, St. Kitts, Antigua, Montserrat, Dominica, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad and British Guiana.—Royal Mail Steam Packet Co., June 8, and every fortnight.

From Vancouver

To Liverpool, London, Rotterdam and Antwerp.—Loch Goil, Royal Mail Steam Packet Co., late June, early July.

To London, Rotterdam and Antwerp.—Drechtdyk, Holland-American Line, June 28; Dinteldyk, Royal Mail Steam Packet Co., late July.

To Manchester (via Panama Canal).—Howick Hall, Manchester Lines, Ltd., June 6.

To Rotterdam, Amsterdam, London, Liverpool, Glasgow, Antwerp and Hamburg.—Loch Katrine, joint service of Holland-American Line and the Royal Mail Steam Packet Co., June 7—via Panama Canal.

To Auckland, Sydney, Melbourne and Adelaide.—Canadian Scottish, Canadian Government Merchant Marine, June 20.

To Auckland, Melbourne and Sydney.—Wairuna, Canadian-Australasian Royal Mail Line, July 14.

To Honolulu, Suva, Auckland and Sydney.—Makura, Canadian-Australasian Royal Mail Line, June 29.

To Yokohama, Kobe, Shanghai and Bombay.—Canadian Winner, Canadian Government Merchant Marine, June 20; Canadian Transporter, Canadian Government Merchant Marine, June 30.

To India.—Canadian Winner, Canadian Government Merchant Marine, June 20.

To Kobe, Shanghai, Hong Kong and Manila.—Grace Dollar, Canadian Robert Dollar Co., June 10.

To Yokohama, Kobe, Moji, Shanghai and Manila.—Manila Maru, Empire Shipping Co., June 6.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Australia, Canadian Pacific Steamships, Ltd., May 31; Empress of Canada, Canadian Pacific Steamships, Ltd., June 28.

To Yokohama, Kobe, Moji and Shanghai.—Manila Maru, Osaka Shosen Kaisha, June 6.

To Yokohama, Kobe, Moji, Dairen, Shanghai and Hong Kong.—Arizona Maru, Osaka Shosen Kaisha, May 21; Africa Maru, Empire Shipping Co., June 12.

To Yokohama, Kobe, Moji, Shanghai, Hong Kong (also calls at Dairen, Manchuria).—Africa Maru, Osaka Shosen Kaisha, June 12.

To Yokohama, Kobe, Hong Kong and Manila.—Protesilaus, Blue Funnel Line, June 14; Achilles, Blue Funnel Line, July 12.

To Yokohama and Kobe.—Toyooka Maru, Nippon Yusen Kaisha, May 31; Toyama Maru, Nippon Yusen Kaisha, June 22; Hakata Maru, Nippon Yusen Kaisha, July 13.

From Victoria

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Australia, Canadian Pacific Steamships, Ltd., May 31.

To Honolulu, Suva, Auckland and Sydney.—Makura, Canadian-Australasian Royal Mail Line, June 30.

To Manila (via Oriental Ports).—Admiral, Pacific Steamship Company, June 6, and every twelve days.

To Yokohama, Kobe, Shanghai, Hong Kong and Manila.—President Grant, Admiral Oriental Line, June 7; President Madison, Admiral Oriental Line, June 17; Empress of Canada, Canadian Pacific Steamships, Ltd., June 28.

To Yokohama, Kobe, Moji, Dairen, Shanghai, Manila and Hong Kong.—Arabia Maru, Osaka Shosen Kaisha, May 22.

To Yokohama, Kobe, Moji, Dairen, Shanghai and Hong Kong.—Africa Maru, Osaka Shosen Kaisha, June 22.

To Yokohama, Kobe, Moji, Shanghai and Manila.—Manila Maru, Osaka Shosen Kaisha, June 16.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Kaga Maru, Nippon Yusen Kaisha, June 12; Empress of Asia, Canadian Pacific Steamships, Ltd., June 14; Iyo Maru, Nippon Yusen Kaisha, June 30; Shidzuoka Maru, Nippon Yusen Kaisha, July 16.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Kaga Maru, June 12; Iyo Maru, June 30—both of the Nippon Yusen Kaisha.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

Lucien Pacaud, Secretary to the Office of the High Commissioner for Canada in London, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada, and Newfoundland, 285 Beaver Hall Hill, Montreal, Que. Telegraphic address: "Britcom."

The British Trade Commissioner (for Ontario), 24 Adelaide St. West, Toronto, Ont. Telegraphic address: "Toroncom."

The British Trade Commissioner (for British Columbia), 210 Winch Bldg., Vancouver. Telegraphic address: "Vancom."

The Officer-in-Charge, British Trade Commissioner's Office, 703 Union Bank Bldg., Winnipeg. Telegraphic address: "Wincom."

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address Canadian.*

Australia

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil

E. L. McColl. Address for letters—Caixa Postal 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China

J. W. Ross. Address for letters—P.O. Box 300. Office—Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba

Address: 400 and 401 Teniente Rey 11, Havana. (Post Office Box 1290.) *Cable Address, Cantracom.*

France

Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland

Norman D. Johnston, Zuidblaak 26, Rotterdam, *Cable Address, Watermill.*

India and Ceylon

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico

C. Noel Wilde. Address for letters, Apartado Num. 126 bis, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian.*

New Zealand

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements

A. B. Muddiman, P.O. Box 121, Singapore. (Territory covers Straits Settlements. British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

Douglas S. Cole, Acting Trade Commissioner, Sun Building, Clare street, Bristol. *Cable Address, Canadian.*

Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States

Frederic Hudd, 44 Whitehall street, New York City. *Cable Address, Cantracom.*

Trade Commissioner P. W. Ward, formerly of Singapore, is at present temporarily attached to headquarters at Ottawa.

CANADIAN COMMERCIAL AGENTS

Australia

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark

C. E. Sontum, Grubbegd, N. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

Vol. XXVIII June 9, 1923 No. 1010

Subscription Price for Commercial Intelligence Journal
Exports of Canada, March, 1921, to March, 1923 (Graph)
Trade and Financial Conditions: Australia; Italy
The Marketing of Australian Wheat for Season 1922-23
Egg Box Requirements of Ireland (with Illustrations)
The Market for Food Products in British Malaya
Representation of Canadian Export Firms in Japan
Trade Inquiries for: Apples; Flour; Sugar; Fish; Antimony; Paper; Leather; Boots and Shoes; Doors; Dry Goods; Drugs; Chemicals; Auto Accessories; Etc.

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

Printed by F. A. ACLAND, Printer to the King's Most Excellent Majesty

TABLE OF CONTENTS

Commercial Intelligence Journal

Issued Every Saturday by the Department of Trade and Commerce

Ottawa **June 9, 1923** **No. 1010**

SUBSCRIPTIONS TO THE *COMMERCIAL INTELLIGENCE JOURNAL* AND ITS ASSOCIATED PUBLICATIONS

The Department of Trade and Commerce desires to announce that, in view of the heavy expense now involved in the publication of the *Commercial Intelligence Journal*, commencing with the 1st of July next a nominal subscription price will be charged for this publication. The price therefor to addresses in Canada will be $1 per annum (single copies 5 cents each); and to addresses outside the Dominion $3.50 per annum (single copies 10 cents each).

Individuals and firms now in receipt of this publication should forward their subscriptions addressed to " The Accountant, Department of Trade and Commerce, Ottawa, Canada"; and it will be understood that those who do not forward their subscriptions before July 1 no longer desire to receive it, and their names will be removed from the mailing list.

It should be specially noted that those who pay an annual subscription will receive on request, without extra charge, the special reports issued from time to time in the form of Supplements to the *Commercial Intelligence Journal*. Those who are not on the regular mailing list may purchase these special reports at a cost of 25 cents each to addresses in Canada, and 35 cents outside the Dominion.

Remittances may be made by post office or express orders, or drafts, or cheques, payable at par in Ottawa.

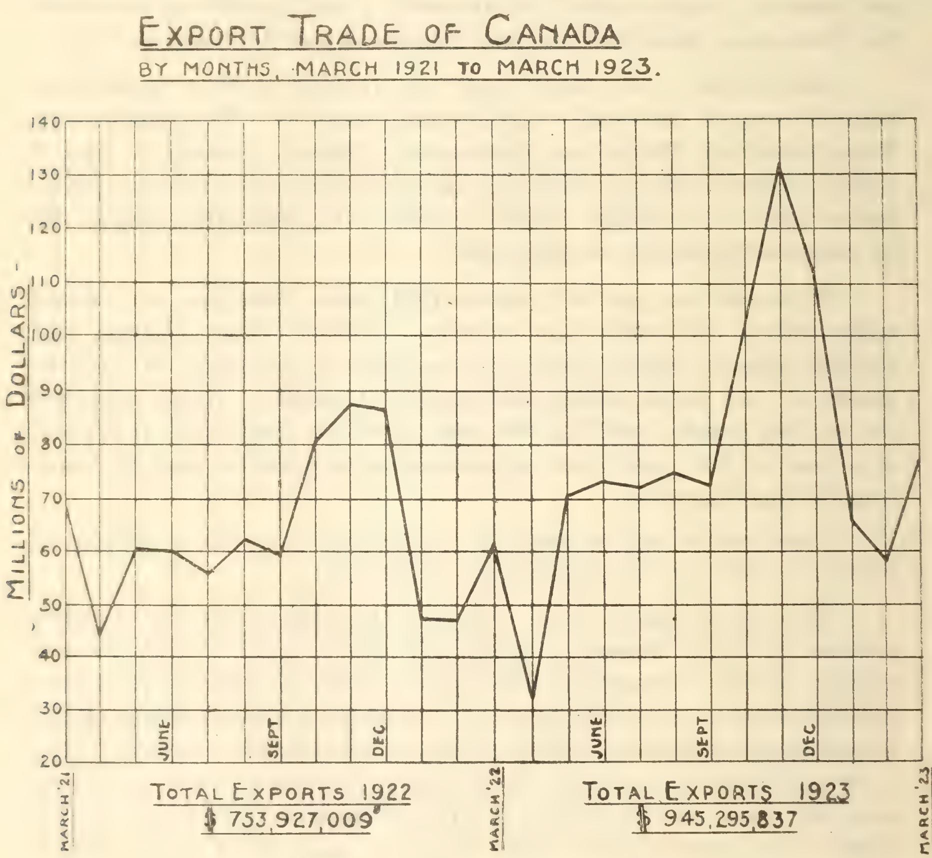
The subscription price referred to above for the English edition will not, however, apply for the present to the French edition of the *Commercial Intelligence Journal*, which it is hoped will be issued in the near future. It had been the intention of the Department to publish such an edition some months ago, but owing to the difficulty in securing the necessary additional staff to undertake the work of translation, it will not appear for several weeks. Those who have signified their desire to have the French edition will receive it, when issued, up to the 1st of January next without charge. After that date the subscription price will be the same as that charged for the English edition.

CANADA'S EXPORTS, BY MONTHS, MARCH, 1921, TO MARCH, 1923

The graph shown below illustrates the increase in Canada's export trade during the fiscal year ending March 31, 1923, as compared with the preceding year.

The total exports increased from $753,927,009 in 1922, to $945,295.837 in 1923—a gain of $191,368,828, or 25·4 per cent.

The commodities which showed the most pronounced increases are: butter, wheat, wheat flour, bran, sugar, canned vegetables, planks and boards of wood, shingles, chemical pulp, newsprint and wrapping paper, cement, rubber boots and shoes, rubber tires, aluminum bars and blocks, copper ore, gold ore, nickel, silver ore and bullion, lead, cyanamid, scrap iron, iron wire, automobiles and parts, raw wool, and raw hides and skins.



MARKET CONDITIONS IN AUSTRALIA

Mr. D. H. Ross, Canadian Trade Commissioner in Melbourne, sends under date June 3, 1923, the following cable descriptive of market conditions in Australia:—

"For the ten months ended April 30 last imports aggregated £109,771,781, showing an increase of £28,262,832; exports totalled £104,104,608, showing decrease of £1,568,642 compared with previous period. Wheat market lifeless, nominally 5s. 4d. to 5s. 5d. per bushel, 60 pounds free aboard but quotations above London parity. Flour in 150-pound sacks £10 to £10 2s. 6d. per ton of 2,000 pounds. Canned fruits accumulations assisted by Commonwealth Government advances now aggregate some 700,000 cases, hence market depressed and prices steadily falling with outlook for inevitable serious loss in realization. While the trade outlook has materially improved through recent general rains, there is little business activity but this is the usual experience during Australian winter months."

AUSTRALIAN FINANCIAL CONDITIONS

Trade Commissioner D. H. Ross

Melbourne, May 1, 1923.—For the first eight months of the fiscal year to February 28 the value of the imports into Australia was £89,214,470, and the exports during the same period aggregated £81,305,836.

The Commonwealth customs revenue for the ten months ended April 30 totalled £27,640,885 compared with £22,818,880 for the previous similar period. The postal revenue to April 30 (derived from stamps, telegrams, and telephones) was £8,067,071 compared with £7,668,492 to the same date last year. The Commonwealth Treasury is thus in receipt of returns greatly exceeding the estimates.

There is at this date no improvement in the seasonal outlook from that depicted on March 27, at which time, as now, ardent hope was expressed for a copious fall of rain. While certain limited areas in some of the states have benefited by heavy showers, the Commonwealth as a whole has not experienced any substantial relief from the drought conditions, which are rapidly assuming a most serious aspect. It is not yet too late for relief, but even if rain comes soon, the indications are that primary production in the season of 1923-24 will perforce be upon a restricted basis. Under such circumstances it can readily be conjectured that there is no animation in commerce, and that importers are, to a great extent, marking time and only ordering essential requirements from oversea.

Practically the whole of the 1922 clip of Australian wool has been sold, and the concluding sales disclosed a persistent demand for the better types at higher prices. The huge wool selling warehouses are empty, and very small supplies will be available for several months. During the last fortnight there has been quite an exodus of British and other oversea wool buyers, most of whom make this hurried annual pilgrimage to their headquarters to adjudicate on the season's purchases and to formulate their operating plans for the following clip. On the whole, Australian wool growers have had excellent results in recent years and, in round figures, the returns for the 1922 clip are estimated at from £38,000,000 to £40,000,000. Except for the depressed climatic outlook wool growers could take a most optimistic view of their future prospects.

At the closing of this mail, the Victorian Wheat Growers' (co-operative) Corporation has withdrawn all quotations on wheat for export (through adverse climatic conditions making it necessary to conserve stocks in view of future domestic requirements), following sales of considerable shipments for export in June, chiefly to South Africa, Italy, and Japan. Such wheat as is outside the pool was quoted to-day at 5s. 7d. ($1.36) per bushel free on board steamer Melbourne.

Concurrently the demand, in the dry areas, for by-products (bran and sharps) has given millers an impetus to the production of flour, which for export is quoted, in 150-pound sacks, from £10 15s. ($52.32) to £10 17s. 6d. ($52.92) per ton of 2,000 pounds free on board steamer Melbourne. The sales of flour for shipment in May and June, chiefly to South Africa and Mediterranean ports, have been fairly large, but offers from the United Kingdom have been below millers' ideas of value.

MARKETING AUSTRALIAN WHEAT

Trade Commissioner D. H. Ross

Melbourne, May 1, 1923.—In *Commercial Intelligence Journal* No. 978 appeared a report on what had been accomplished in Australia by the compulsory marketing control of wheat from 1915-16 to 1920-21, and in the subsequent period by voluntary pooling.

Correspondence received from the grain-growing provinces in Canada indicates that the report aroused considerable interest, hence it is considered that some supplementary details of the marketing of wheat in 1923 may be illuminative—for comparative purposes—to wheat growers in the Dominion.

At this date the Australian conditions are far from normal as a long continuance of dry weather obviously affects the trading outlook in the hardening of prices, as provision has to be made for a possible drought and the consequent failure of the 1923-24 crop, which (through the adverse climatic season) has not yet been sown.

Exports so far of the 1922-23 wheat crop have been in considerable volume and, in wheat and flour, are estimated to be in the vicinity of 35,000,000 bushels, leaving a considerable surplus yet available for export (in grain or flour) should the ardently hoped for rainfall be experienced. Growers in a position to hold are not offering their surplus either to the voluntary pools or to domestic millers, and especially so because cabled advices from various oversea markets have been encouraging to holders. The fact that speculative buyers are entering into the market is further accentuating the lack of stability in marketing.

Last week a conference of the executives of the voluntary wheat pools in New South Wales, Victoria, South Australia, and Western Australia was held in Melbourne, when matters of common interest were discussed and a definite mutual plan of campaign for the continuance of pooling in future seasons was decided upon.

It is considered that, despite the adverse interests to be contended against this season, the voluntary pools in the four wheat-growing states in Australia will control the bulk of the wheat exported in 1923, and that the tendency of growers (after experiencing the results of marketing through the pools and selling to private buyers) is more and more towards supporting a corporation controlled by themselves, and in which all the profits are distributed upon an equitable basis to primary producers.

While admitting that in some of the states there has been considerable propaganda against voluntary pooling, yet it is undoubted that this pronounced

antagonism is being overcome by reason of the results attained by the pools. On expert (and disinterested) authority, it is conceded that so far the 1923 exports of wheat have been controlled by voluntary pools to the extent of 90 per cent of the total in Western Australia, 75 per cent in Victoria, 55 per cent in New South Wales, and 50 per cent in South Australia.

FINANCING SHIPMENTS OF WHEAT IN 1923

As set out in the previous report, as a reflex of this season's co-operative and voluntary system of marketing wheat in all the Australian states, the Victorian Wheat Growers' Corporation (composed entirely of wheat growers) arranged its own finance with the Associated Banks in Melbourne, upon the following basis:—

(1) An advance of 3s. (73 cents) per bushel to growers on delivery of wheat at country railway stations.
(2) An advance of 8d. (16 cents) per bushel to the Wheat Growers' Corporation, as required, to pay railway freight and working expenses.
(3) The negotiation of shipping documents and the transfer of funds from London, etc., to Melbourne.

It may be well to reiterate that this corporation realized £65,000 in the season of 1921-22 from chartering commission, agency fees, etc., which represented a gain of ½d. (1 cent) per bushel on the entire pool, and constituted about twice the total cost of administration. It appears a fair deduction that these additional earnings—in proportion to the quantity exported—will be realized in the 1922-23 season.

ACTUAL PRICES REALIZED BY AUSTRALIAN WHEAT GROWERS

While the final figures covering the results obtained by the Victorian Wheat Growers' Corporation are not available, yet it is considered that the free on board steamer at Melbourne equivalent will be about 5s. 5¼d. ($1.32½) per bushel, from which is deducted the inland railway transportation and shipping charges aggregating 8d. (16 cents) per bushel, hence it may with confidence be assumed that wheat growers in the State of Victoria will receive a net return of 4s. 9¼. ($1.16) per bushel for all the wheat produced by them in 1921-22. So far this (1922-23) season, farmers have received an advance from their corporation of 4s. (97 cents) per bushel with a deduction of freight at 4½d. (9 cents) or 3s. 7½d. (88 cents) net, with of course a further advance as sales are made, and the total payments are anticipated to exceed those made in the previous year.

QUOTATIONS RULING ON 1922-23 AUSTRALIAN WHEAT

In making shipments of Australian wheat to the Orient, South Africa, and some other markets, the realization (by reason of lower freights and other factors) is frequently 3d. (6 cents) or more per bushel higher than London parity. At times, as in other countries, speculative buying—or " futures "—for delivery at specified dates has an important influence on returns to growers.

The first new wheat in the 1922-23 season was available for export about November 1, 1922. In the appended schedule the Melbourne " free on board steamer " equivalent on indicated London quotations does not represent the true market value in the world's markets (as realization in some markets was higher), but is submitted for comparative purposes only.

F.o.b. Melbourne quotations on London parity:—

November 2, 1922	5s. 2.8d.	per bushel.
November 21, 1922	5s. 4.25d.	per bushel.
December 4, 1922	5s. 5d.	per bushel.
December 13, 1922	5s. 4.25d.	per bushel.
January 3, 1923	5s. 1.32d.	per bushel.
January 23, 1923	4s. 11.9d.	per bushel.
February 12, 1923	4s. 9.7d.	per bushel.
February 27, 1923	4s. 10.25d.	per bushel.
March 5, 1923	4s. 10.1d.	per bushel.
March 27, 1923	5s. 3.5d.	per bushel.
April 7, 1923	5s. 3.5d.	per bushel.
April 21, 1923	5s. 5.7d.	per bushel.

STOCKS HELD OF AUSTRALIAN CANNED FRUIT

Trade Commissioner D. H. Ross

Melbourne, May 1, 1923.—At the beginning of 1923, approximately 260,000 cases of Australian canned fruit were stored in England waiting realization. In round figures, the 1922-23 fruit-canning industry will aggregate about 550,000 cases, of which the domestic demand will take some 150,000 cases, leaving a surplus of 400,000 cases for export. Efforts are being made to induce a large domestic consumption concurrently with seeking new outlets where the fruit can be marketed at a profitable price. In the latter connection, particular attention is now being devoted to the requirements of India, Java and the Orient.

In so far as competition in the British market is concerned, Australian canned fruit has chiefly to contend against brands of Californian fruit of old-established reputation, both in quality and price, hence this season's pack of Australian has been graded, processed and canned, with greater care than in previous years with the object of successfully meeting that competition.

COMMONWEALTH OF AUSTRALIA FRUIT POOLS

In No. 937 of the *Commercial Intelligence Journal* there appeared a comprehensive survey on fruit production in Australia, and the assistance rendered to the industry by the Commonwealth and (some) State Governments. The review was supplemented in No. 944, in which is outlined the arrangements entered into by the Commerce Branch of the Commonwealth Department of Trade and Customs for pooling the 1921-22 production of soft fruits, and the conditions governing the payments to growers, together with the canning requirements and financing oversea shipments.

No good service can be rendered in recapitulating data already on record, but the result of almost paternal assistance in an endeavour to place the industry in a position to meet competition—both as regards quality and value—in the world's markets is dwelt upon in subsequent paragraphs for the information of Canadian fruit canners and exporters.

HEAVY LOSSES ON AUSTRALIAN FRUIT POOLS

It is estimated that the loss in realization of the 1920-21 fruit pool will be in the vicinity of £26,000. As there is much canned fruit of the 1921-22 pool still unsold, both in England and in Australia, it is mere conjecture what the loss on that year's realization will aggregate. That a heavy loss is anticipated is undoubted, and various estimates—ranging from £200,000 to £400,000—have been published, but probably the former figures will prove not wide of the mark. Assuming that the lower estimate will prove to be approximately correct, then the loss to the Commonwealth Government for the two seasons will be about

£262,000. In sequence to the above two pools is the pool for 1922-23 which has also received substantial advances from the Federal Government, and it is hoped that this season's operations will realize much more satisfactory results. The cost of processing has been much reduced this season, and the pack generally is regarded as being of exceptional quality and superior to that of 1921-22.

STATE GOVERNMENT CANNERIES

The splendid canning plant, owned and operated by the Government of New South Wales, at Leeton, and the fine plant, financed by the Government of Victoria, at Shepparton, are devoting very great care to establishing a reputation in the world's markets for their special brands of canned peaches, pears, apricots, etc. The obvious object of these States in assisting primary producers is to stabilize the canned fruit industry and to demonstrate that Australian canned fruit is equal in quality and grading to that produced in other countries, particularly in California. When these canneries become a payable proposition they will revert to the fruit growers whom the respective States have so materially assisted.

AUSTRALIAN CITRUS FRUITS

Representatives of the principal citrus associations in Australia have just concluded a conference in Melbourne at which comprehensive arrangements were made for exporting much larger quantities of Washington "Navels" and Valencia oranges than last year, which was the first season the trade had assumed any considerable volume. Large areas in several states are coming into bearing, and production has already greatly exceeded the domestic demand, hence it is recognized as imperative that only carefully selected fruit, well graded and packed, should be exported in order to attain a reputation second to none in oversea markets. For the coming season it is considered that the recognized associations can absolutely guarantee the quality and texture of the fruit on shipment, by reason of much-improved inspection and packing facilities.

At this date, owing to continued dry weather in the citrus-growing areas, it is impossible to estimate how many cases will be available for export, but while reports from the several irrigation districts are favourable the indications are generally for a light crop probably slightly in excess of the previous season.

Last year representatives of Vancouver and San Francisco fruit merchants paid cash in Melbourne, Sydney, etc., for all shipments made to North American centres, and it is assumed that the same procedure will be adopted in the coming season. The buyers also made their own shipping and marine insurance arrangements, hence the business is transacted practically upon a "letter of credit basis," and applications for consignments will not be considered.

A report on shipments of Australian oranges to Canada appeared in *Commercial Intelligence Journal* No. 983, and it was then outlined that the Australian season for Washington "Navels" extended from May to October, and for Valencias from early in September until January.

AUSTRALIAN DRIED FRUITS (CURRANTS, RAISINS, ETC.)

The 1923 Australian dried fruit pack is now practically completed, although the final figures are not yet available. Generally, the season for drying has been extremely favourable, and the fruit has been processed—i.e., dried and packed—under the best conditions, hence the quality being right it is anticipated that it will keep well and can with confidence be shipped to any oversea market.

The production of currants has exceeded anticipations, and the pack is likely to total about 7,614 tons, which has caused the Australian Dried Fruits

Association to declare an export proportion of 50 per cent. While quotations were submitted to Canadian buyers, which shippers thought would be attractive, little business has been done so far. Vancouver advices are to the effect that currants from Greece, though of inferior quality, have satisfied the domestic demand at considerably lower prices than the Australian product could be landed at. Notwithstanding this advice, some Canadian importers have suggested consignments, but practically all Australian shippers of dried fruits have (through previous disastrous experiences) determined to discontinue that method of realization, and particularly so as they are able this year to obtain better prices in London than—so far, at any rate—are offered in Canada. It is quite possible that Canadian importers of currants have "spot" requirements and they are not prepared, up to this date, to commit themselves to quantities for forward shipments.

It is estimated that the pack of sultana raisins in Australia this season will show a total of 11,407 tons, of which the export proportion of 55 per cent has been declared. The pack is much larger than anticipated. It is scarcely expected that Canadian buyers will be much interested in sultanas, as apparently the market in the Dominion is supplied with the Thompsons' seedless (from California), which sell at a lower price than Australian shippers can accept, hence the London market will, as usual, be the chief outlet for this line.

While the pack returns are at this date incomplete, it is anticipated that some 3,500 tons of lexia raisins will be the total, of which 55 per cent has been declared for export. It is admitted that this class of fruit has to compete with Californian seeded muscats, which are dried in a natural condition, and hence appear more suited to the popular taste in Canada than the lexia raisins which are of the type of the good old brown pudding variety.

In tree fruits, such as dried apricots, peaches and pears, the Australian Dried Fruits Association has a considerable surplus for export, but while samples have been sent to Vancouver, no business has resulted so far this season. It would appear that the competition from California is hard to overcome—not so far as quality is concerned—but through the fact that the Canadian market has become so accustomed to dried fruits from the latter territory in packing with which they are now so familiar. There is not a very great surplus of these tree fruits for export, but the production is growing. In the interests of an interchange between Canada and Australia, the association is hopeful of securing a much larger proportion of the Canadian requirements of dried fruits, particularly of currants and raisins.

AUSTRALIAN BEEF EXPORT SUBSIDY

C. Hartlett, Office of the Trade Commissioner

Melbourne, May 1, 1923.—The relief afforded by the Australian Government to the meat industry last year, in the form of a subsidy on the export of beef, is to be continued this year.

It is officially announced that from January 1, 1923, a subsidy of 10s. ($2.43) per head will be paid on all live cattle exported, and from March 1 a grant of one farthing ($\frac{1}{2}$ cent) per pound weight will be paid on frozen meat and on canned beef, irrespective of whether the whole of edible beef from the beast is exported or not. In the case of canned beef the bounty will be calculated on the weight of fresh beef from which the canned beef is produced.

Owing to high production and freight costs, and keen competition from the Argentine and other sources which has had to be faced in oversea markets, the Australian beef industry has been in a very depressed condition for the past year or more and the bonus will, at the present time, be of material assistance to both the primary producer and packer.

RELINQUISHMENT OF GOVERNMENT ACTIVITIES IN AUSTRALIA

C. Hartlett, Office of the Trade Commissioner

Melbourne, May 1, 1923.—A revulsion of the sentiment which at one time prompted the Commonwealth and various State Governments in Australia to establish and conduct many commercial and industrial enterprises is at present very much in evidence. As a result of experience, it has been found that these enterprises cannot be profitably conducted in comparison with those managed by private firms, and hence they are being sold as opportunity offers.

The latest instance is the official announcement of the sale as a going concern of the Commonwealth Government woollen mills at Geelong (45 miles from Melbourne) to a syndicate of woolgrowers and business men. The price paid was £155,000, which includes land, buildings, machinery and plant, but not raw materials, stores, and supplies on hand or products in course of manufacture, which are to be taken over at a valuation. Ten years are to be allowed for the payment of the purchase money, and the rate of interest on the unpaid balance of the money is to be 5½ per cent. The mill was originally established by the Government for the manufacture of military cloths in war years, and has been relinquished for the reason that, were the Government to continue operations, a large expenditure would be necessary for the purchase of additional machinery for the manufacture of worsteds and other similar cloths for which the mill was not designed. Such an enterprise would compete with private mills, and such competition is against the policy of the present Commonwealth Government. It is the intention of the new owners to install the additional machinery required and manufacture worsteds and other cloths on a large scale.

Other State-owned activities in manufacture and commerce, such as the Commonwealth harness factory, the timber yards and trawling vessels operated by the New South Wales Government, the Western Australian agricultural implement factory, and various enterprises in other states, are also gradually being turned over to private concerns.

THE FOOTWEAR TRADE OF NEW ZEALAND

Trade Commissioner W. A. Beddoe

Auckland, May 7, 1923.—The market for footwear in New Zealand is well worth the attention of the Canadian exporters of this commodity. The total value of the imports of footwear in the calendar year 1921 was £530,868, of which amount Canada supplied £40,101. These figures include boots and shoes, soles, goloshes, overshoes, gum boots, heel and toe plates, laces, vamps, uppers, and grindery (boot trees and stretchers, lasts, and various articles used in boot-making).

STYLES OF FOOTWEAR USED

The New Zealand public is quite discriminating, and will accept only what is the latest style. The quality of footwear used is good, medium and high grade. The materials and styles must be fashionable. The soles should be fastened with Goodyear welt, McKay, or turned. The upper leather may be of various descriptions, including suedes and coloured kids. At the present time the popular colours are blues, greys, browns, and champagnes. Light tans are not much worn now. The demand for a certain colour usually prevails for two or three seasons and then something new is demanded. The style of the shoe, the last, and the heel depend on the prevailing fashion, and nothing definite can be laid down on these points; but one footwear importer stated that the Canadian boots and shoes had always been suitable in style for this market.

Rubber gum boots of all grades in knee, hip, and thigh lengths are used considerably. Goloshes of various descriptions are also used, but not to as great an extent as a few years ago. Felt footwear is also in demand; the British manufacturers have a firm hold on the felt footwear trade, and their prices are very low. The opinion was expressed that it would be doubtful if Canadian firms could compete in this line.

SOURCES OF SUPPLY

Domestic.—About 10 per cent of New Zealand's requirements of leather footwear is manufactured locally. In March, 1920, there were sixty-four establishments, with an aggregate of about 2,447 employees engaged in this industry. No felt or rubber footwear is made in this country. Local manufacturers produce good quality footwear, but cannot produce the styles to meet public demand.

Canada.—It will be noted from the statistics given that Canada supplied less than 8 per cent of the imports of footwear. Canada led in the imports of goloshes and overshoes of rubber, gymnasium and sporting shoes, and gum boots. British manufacturers are now offering sporting shoes (white canvas tops and rubber soles) at very attractive prices. Smaller quantities of the other classes of footwear were also shipped. The Canadian shipments have proven quite satisfactory, and no complaints have been received by this office. The trade developed through Canadian firms giving exclusive agencies to New Zealand houses and supplying these with a range of samples for submission to prospective buyers.

Great Britain.—The value of the imports of footwear from Great Britain in 1921 was £257,272. These imports included all the classes of footwear used in this country. British footwear is regarded as very satisfactory in this market.

Australia.—The value of the footwear supplied by Australia in 1921 was £169,440. Australian footwear is not suitable for this market, as it will not stand the wet weather experienced during the New Zealand winters.

United States.—The value of the imports of footwear from the United States in 1921 amounted to £56,703, including all grades and classes. The shipments are principally good, medium, and high grade men's welted boots and shoes and women's high and medium grade welts and pump shoes. Practically no children's footwear is imported from the United States. The trade has been developed through New Zealand firms securing the sole agencies for manufacturers and then pushing these lines. Those manufacturers who have been content to send circulars through the post to the trade have met with very little success.

PRICES

The prices of footwear vary of course with the quality. The following may be considered average landed prices—that is, cost, insurance, freight, exchange, and duty.

	Men's	Ladies'	Children's
Boots	£1 to 30s.	......	......
Shoes	£1 to 30s.	15s. to 25s.	3s. to 9s.
Goloshes	4s. to 5s. 6d.	3s. to 4s.	2s. to 3s.
Gum boots—			
Knee length	13s. 6d. to 16s. 6d.	9s. 6d.	8s. 6d.
Hip length	£1 to 23s. 6d.	......	......
Sporting shoes	4s.	4s.	......

The prices of children's shoes vary greatly with the size and quality.

The retailers add from 25 to 33⅓ per cent on footwear bought from wholesale stock and 50 per cent on goods purchased direct from the manufacturers.

OPPORTUNITIES FOR CANADIAN EXPORTERS

The regular lines of Canadian footwear, provided they are up-to-date in style and quality, would sell in competition with similar commodities from the United States. Most of the imported shoes are sent direct to the retail dealers. The agent in this country secures the orders and forwards them to the manufacturer. When the retailer is a man of substance, the manufacturer ships the goods to him and draws upon him direct, crediting the agent with the commission previously arranged. The agent in most cases carries stocks for sorting up sizes. Representatives from Canadian firms would probably not secure the same results as local agents with connections in this country.

Canadian firms should always advise their agents by cable of any change in prices. In one instance considerable business was lost by the Canadian shippers not notifying their New Zealand agent of a reduction in price, while the British manufacturers did so and secured the business.

A list of the principal importers of footwear is on file at the Department of Trade and Commerce, and may be obtained by interested Canadian firms on application to the Director, Commercial Intelligence Service, Ottawa.

TERMS

Canadian firms should quote c.i.f. and exchange at a New Zealand port. Quotations f.o.b. Canadian port would be considered, but c.i.f. & e. quotations are much preferable, cash against documents or by special arrangement, 30 days, 60 days, or 90 days.

DUTIES

The following goods enter duty free from Canada: children's, Nos. 0-9, boots, shoes, shoettes, sandals, clogs and pattens, slippers and goloshes; gum boots, half knee, knee, or thigh, with soles either of leather or rubber and measuring not less than 9½ inches from the lowest point reached by the line of the top of the upper to a horizontal surface on which the boot is placed; grindery is also free excepting heel plates, toe stiffeners n.e.i., and toe plates, all of which are subject to a duty of 20 per cent ad valorem; rubber heels, and knobs; shoe and slipper soles of rubber are dutiable at 10 per cent ad valorem.

The duty on boots, shoes, clogs, pattens, slippers, shoettes, sandals, goloshes, overshoes and other footwear, n.e.i., is 25 per cent ad valorem.

Leather laces, vamps and uppers, leather cut into shapes; clogs and patten soles, and leather leggings are dutiable at 25 per cent ad valorem.

There is a primage duty of 1 per cent ad valorem payable on all goods imported into New Zealand, and for duty purposes 10 per cent is added.

IMPORTS INTO NEW ZEALAND FROM CANADA DURING THE FISCAL YEAR ENDED MARCH 31, 1923

Mr. W. A. Beddoe, Canadian Trade Commissioner in Auckland, under date of May 7, 1923, reports that according to the official trade returns of the Dominion of New Zealand, the total value of the imports into New Zealand from Canada for the fiscal year ending March 31, 1923, was £1,959,958 ($9,899,790), an increase over last year of £733,509 ($3,767,545).

Increases.—Fish, preserved in tins, £42,486; chocolate, in fancy packages, £3,618; apparel and ready-made clothing, £44,872; furs made up into apparel, £3,502 hosiery, £24,610; cotton piece goods n.e.i., £17,823; fencing staples, £8,923; other nails, including log spikes, £44,685; tools, other, £7,048; fencing

wire, barbed, £32,420; fencing wire, plain, £43,831; bare copper wire, £6,745; iron wire, n.e.i., £23,200; reapers and binders, £4,029; leather, japanned and enamelled, £4,256; sole leather, bends over 14 pounds, £7,534; timber sawn rough, Douglas fir, £5,158; sawn dressed, other, £9,958; doors and sashes, £7,451; woodenware and turnery n.e.i., £11,908; cameras, including lenses, £7,541; toilet preparations, £5,218; soap n.e.i., £4,119; passenger vehicles other than buses, £424,157; chassis for same, £18,129; chassis for lorries, trucks, vans and buses, £5,565; rubber tires, tubes and covers, £92,486.

Decreases.—Apples, fresh, £2,030; goloshes and overshoes of rubber, £8,450; corsets, £27,472; iron and steel, bar, bolt and rod, £8,090; hardware, hollow-ware and ironmongery, £5,049; iron and steel plate and sheet, plain black, £11,227; tubes, pipes and fittings—wrought, 6-inch and under internal diameter, £86,260; rills and sowers, £18,053; engineers', etc., tools, £9,431; paperhangings, £28,662; printing paper, £79,639; writing paper, £5,376; stationery n.e.i., £8,950; sensitized surfaces and albumenized paper, £10,921; vehicles n.e.i., £16,221.

An exhaustive table showing the values of the various lines of imports into New Zealand from Canada, together with the articles affected by and the value of the Canadian preference for the fiscal year ending March 31, 1923, has been transmitted by Mr. Beddoe, and placed on file at the Department of Trade and Commerce, Ottawa, where it is available for interested Canadian firms on application to the Director, Commercial Intelligence Service, Ottawa (quote file No. T.C.-4-100).

MARKET FOR EGG BOXES IN IRELAND

TRADE COMMISSIONER GORDON B. JOHNSON

SPECIFICATIONS AND GENERAL INFORMATION

Glasgow, May 15, 1923.—Ireland in 1921 exported eggs, mainly to England and Scotland, of a value of nearly 48 million dollars. The matter of the boxing of such immense quantities of eggs is therefore one which should be of interest to Canadian manufacturers of box shooks.

The Department of Agriculture and Technical Instruction for Ireland, in its Memorandum on the Marketing of Eggs, gives very full information regarding its requirements in this connection. It says that the carrying companies will accept at carrier's risk, from Irish egg merchants, consignments of eggs packed in standard cases of Nos. 1, 2, and 3, constructed in accordance with the specifications which follow, providing that the packing is in conformity with the recommendations made, and that each case bears the label issued by the department for use on approved cases.

This information should be of value not only to the makers of boxes who may be able to capture some of this large trade, but may perhaps give some useful hints to exporters of Canadian eggs to the United Kingdom.

IRISH STANDARD PACKING CASES AND PACKING CONDITIONS

The internal dimensions and thicknesses of timber mentioned in the specifications for Cases Nos. 1 and 2 are to be regarded as *minimum* dimensions; all timber thicknesses are *actual*, not nominal.

No. 1 Standard Case

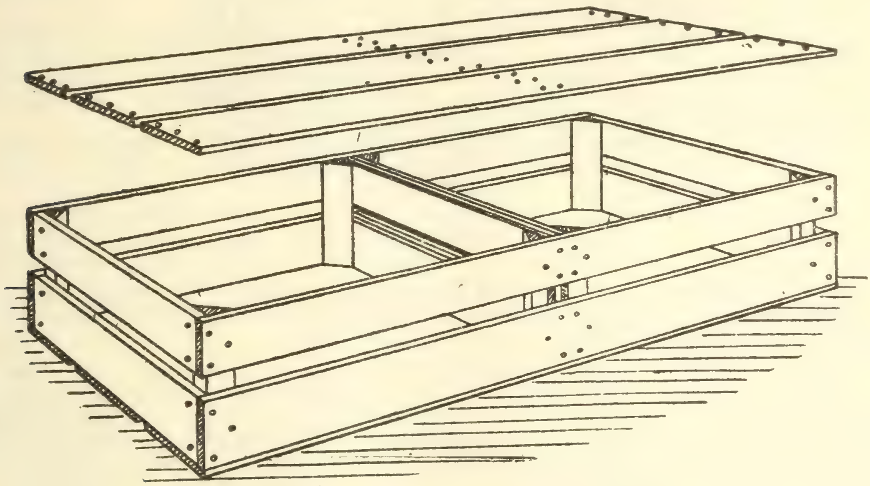
Standard 6 hhd. egg case to be used for not more than 6 hhd. (720) hen eggs, less than 18 lb. per 120; or 5 hhd. (600) hen eggs weighing 18 lb. or more per 120, or 5 hhd. (600) duck eggs weighing 18 lb. or more per 120.

Description.—The case should be made in two compartments, each compartment to hold 3 hhd. (360) hen eggs less than 18 lb. per 120, packed in three layers, each containing 10 rows of eggs with 12 eggs in each row; or 2½ hhd. (300) hen eggs weighing 18 lb. or more per 120; or 2½ hhd. (300) duck eggs weighing 18 lb. or more per 120, packed in three layers, each containing 9 rows of eggs with 11 eggs in each row, and 1 odd.

Any of the three following methods of construction, A, B or C, may be adopted for this case.

Construction A for No. 1 Standard Case

With ends and sides consisting of two boards spaced horizontally and with eight corner angle posts.



INTERNAL DIMENSIONS Each compartment to be not less than			TIMBER DIMENSIONS to be not less than						
Length	Width	Depth	Top and bottom boards Wide	Thick	Side boards Wide	Thick	End and centre boards Wide	Thick	Corner Angle posts
26″	23″	8″	4″	⅜″	3″	⅜″	3″	⅝″	2″ square cut diagonally
Spacing between any two adjoining top, bottom, side and end boards nowhere to exceed 1 inch. Saw space not exceeding ¼ inch must be provided between centre division boards.									

Ends and Centre Divisions.—The case should have two centre divisions, each centre division and each end consisting of two boards; no board should be less than 23 inches by 3 inches by ⅝ inch. If end boards of greater thickness than ⅝-inch are used, care should be taken to ensure that the internal length of each compartment be not less than the required 26 inches.

Sides.—The side boards should be of the full outside length of the case; no side boards should be less than 3 inches wide nor less than ⅜-inch thick.

The side boards must be so fixed that the top edge of the upper board, and the bottom edge of the lower board, will be level with the top and bottom edges, respectively, of the end boards.

Tops and Bottoms.—Top and bottom boards should be not less than 4 inches wide and not less than ⅜-inch thick.

The outer edges of the outside top boards and bottom boards, when nailed on, should be flush with the outer sides of the side boards. The top and bottom boards should be of the full outside length of the case, and be nailed into the end boards.

Corner Angle Posts.—All corner angle posts must be of the full internal depth of the case, cut diagonally from a post 2 inches square. Square cut corner posts are not permissible.

Timber.—The wood must be well seasoned, clean, dry, and free from bark, wane and feather.

Nails and Nailing.—The nails used for making up Case No. 1 must be of sizes not less than the following:—

For nailing sides to ends, 2-inch nails of 13 gauge.
For nailing tops and bottoms to ends and centre division boards, 1¾-inch nails of 13 gauge.
For nailing corner posts to ends, 1½-inch nails of 14 gauge.
For nailing sides to corner posts, 1½-inch nails of 14 gauge.
For nailing end battens to end boards, 1¼-inch nails of 14 gauge.

It is recommended that cement-coated wire nails be used, and that, so far as possible, nails should be driven askew the grain of the wood.

Not less than two nails must be used in each end of each board, and an additional nail must be used at each end of a board for every 3 inches or part of 3 inches by which the board exceeds 5 inches in width. This also applies to the nailing of the centre division boards. Each end of each side board must be secured by at least two nails driven into the end boards, and at least one nail driven into the corner post.

In nailing top and bottom boards to centre division boards, care should be taken to place the nails in rows with at least ⅜-inch space between the rows, to allow for the free working of a saw when the case is being divided.

No. 2 Standard Case

Standard 3 hhd. egg case to be used for not more than 3 hhd. (360) hen eggs, less than 18 lb. per 120, or 2½ hhd. (300) hen eggs weighing 18 lb. or more per 120, or 2½ hhd. (300) duck eggs, weighing 18 lb. or more per 120.

Description.—The case should be made in one compartment, to hold 3 hhd. (360) hen eggs, less than 18 lb. per 120, packed in 3 layers, each containing 10 rows of eggs with 12 eggs in each row; or 2½ hhd. (300) hen eggs weighing 18 lb. or more per 120; or 2½ hhd. (300) duck eggs weighing 18 lb. or more per 120, packed in 3 layers, each containing 9 rows of eggs with 11 eggs in each row, and 1 odd.

INTERNAL DIMENSIONS Each compartment to be not less than			TIMBER DIMENSIONS to be not less than			
Length	Width	Depth	Top and bottom boards Wide Thick	Side boards Wide Thick	End and centre boards Wide Thick	Corner Angle posts
26″	23″	8″	4″ ⅜″	3″ ⅜″	3″ ⅝″	2″ square cut diagonally
Spacing between any two adjoining top, bottom, side and end boards nowhere to exceed 1 inch.						

This case, which is one-half of the No. 1 Standard Case, may be made according to three constructions.

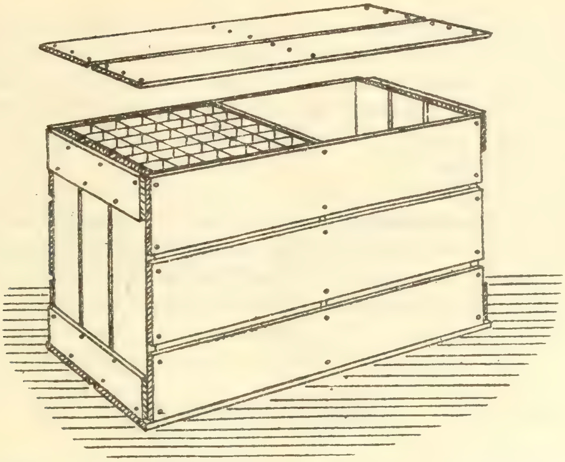
Construction A.—Same as for No. 1 Standard Case (Construction A), with ends and sides consisting of two boards spaced horizontally and with four corner angle posts.

No. 3 Standard Case

Standard 3 hhd. (360) egg case, fitted with fillers, for graded eggs, not exceeding 16 lb. per 120.

Case No. 3 is preferred by many shippers for certain classes of trade and for cold storage. In order to diminish the risk of injury to eggs during transit, when packed in Case No. 3, each egg should be wrapped or embedded in paper, fine wood wool, or some other suitable material.

Description.—The case should be made in two compartments, each compartment to take 180 eggs packed in fillers with flats between the fillers.



INTERNAL DIMENSIONS Each compartment to be			TIMBER DIMENSIONS to be not less than				FILLERS Each division to be	
Length	Width	Depth	Top, bottom and side boards		End and centre boards		Depth	Square
			Wide	Thick	Wide	Thick		
11⅝"	11⅝"	13½"	3"	¼"	3"	7/16"	2½"	1¾"

Ends.—Each end should be 13½ inches deep by 11⅝ inches wide, by not less than 7/16-inch thick. If made of two or more boards, the boards should be fixed upright; no end board should be less than 3 inches wide. The end boards should be nailed to cross battens measuring not less than 11⅝ inches by 2½ inches by 7/16-inch thick, two on each end, fixed externally, one across the bottoms of the end boards and the other as close to the tops of the end boards as the construction of the lid permits.

Centre Division.—Each board should be 13½ inches deep and 11⅝ inches wide, and not less than 7/16-inch thick. The division should be fixed in the centre of the case secured by nails driven through the side and bottom boards.

Sides, Tops and Bottoms.—Each board should be not less than ¼-inch thick, and not less than 3 inches in width.

Spacing.—The spacing between any two adjoining boards throughout the case shall nowhere exceed ⅝-inch. When spacing is provided between any two side boards, it should be arranged so as to prevent any of the flats working through and the eggs coming in contact.

Note.—When not intended for cold storing, spacing between boards is not essential.

Fillers.—The fillers should be of wood pulp of calibre not less than ·030, or other suitable material 2½ inches in depth, each division shoud be 1¾ inches square; the extreme width of a filler to be 11½ inches; a flat of the same material should be placed between each pair of fillers. It is usual to place a flat underneath the bottom filler and another above the top filler, thus using 10 fillers and 12 flats. Sometimes, however, the bottom and top flats are omitted, when 10 fillers and 8 flats only are used.

A layer of fine wood wool, corrugated paper, or of neatly drawn straw of even thickness throughout, should be placed underneath each lowest filler, and above each uppermost filler. These layers should be of such thickness that each will be ¼-inch thick when the case is closed down. Parchment paper envelopes containing wood wool may be used instead, in which case 8 flats only are needed.

Nails and Nailing.—Not less than two nails must be used in each end of each board, and an additional nail must be used at each end of a board for every 3 inches or part of 3 inches by which the board exceeds 5 inches in width.

The nails for making up case No. 3 must not be less than 1½ inches of 14 gauge. It is recommended that cement-coated wire nails should be used, and that, so far as possible, nails should be driven askew the grain of the wood.

All Timber Thicknesses Specified are Actual and Not Nominal.

The above specifications indicate what sort of boxes are required by the egg shippers in Ireland. From Canada such boxes would of course be shipped to Ireland in a knocked-down condition, and recommendations regarding nailing and so on would apply mainly to Ireland itself, but they are included in order to show how the complete box, with fillers and flats, etc., is made ready for the reception of the eggs.

Among the trade inquiries in this issue will be found one from a Dublin firm for these boxes. Quotations might be made direct to this firm, or to this office when they will be presented to firms in Ireland which import this material. Quotations should be in sterling c.i.f. Dublin or Belfast, to which ports an excellent direct service is maintained from Montreal.

BRISTOL MARKET FOR FISH OIL

Acting Trade Commissioner Douglas S. Cole

Bristol, May 16, 1923.—In view of the new tariff of 20 per cent on fish oils entering the United States, the attention of Canadian exporters should be directed to the United Kingdom as a market for their product. Not only is there a large consumption in the country itself, but there is also a fair re-export business.

By a process consisting of making hydrogen combine with the unsaturated compounds in oils so as to form a saturated solid fat, it has been possible to transform an evil-smelling fish oil into a white odorless fat, with a consistency ranging from soft lard to that of a hard tallow according to the activity of the hydrogenation which takes place. Although this is a comparatively new industry, it is of interest to note that even in 1912 the world's supply of whale oil was estimated at 1,200,000 barrels, or approximately 42,000 tons, more than half of which was derived from Norway. Nearly the whole of this whale oil is now hydrogenated into solid fat which is used in the manufacture of margarine and soap.

The imports into the United Kingdom of colonial and foreign fish oils in 1921 aggregated 32,358 tons valued at £1,114,457, made up as follows: whale oil, 25,021 tons (£76,410); cod liver oil, 2,559 tons (£138,005); other sorts (which consist of seal oil, cod oil, and mixed fish oil), 4,778 tons (£212,-042). The total for 1922 was 33,279 tons valued at £1,180,676. The distribution of these supplies by countries of origin indicates that in so far as imports from British possessions are concerned, British South Africa is credited with 1,234 tons (£45,908) in 1921, and the Falkland Islands (which does a steady trade) with 9,642 tons ($254,541). These are the only parts of the Empire exporting to any extent. The imports from Norway totalled 1,546 tons valued at £67,831. Japan also does considerable business, but the principal contributor is the Southern Whale Fisheries. A large proportion of the imports are retained in the United Kingdom. These aggregated in 1921, 31,362 tons valued at £1,064,330, made up as follows: whale oil, 24,383 tons (£740,405); cod liver oil, 2,390 (£116,963); other sorts, 4,589 tons (£206,962). Some 996 tons valued at £50,127 were re-exported in 1921, of which 638 tons (£24,005) were whale oil, 169 tons (£21,042) cod liver oil, and 189 tons (£5,080) "other sorts." In 1922 the total was 3,425 tons valued at £106,894. The total exports of fish oil of United Kingdom manufacture were in 1921, 7,658 tons valued at £244,063, made up as follows: whale oil, 2,861 tons (£98,768); cod liver oil, 1,565 tons (£44,801); other sorts, 3,252 tons (£100,494).

In explanation of the fact that there are exports in quantity of fish oils of United Kingdom manufacture, it should be stated that one large international combine with headquarters in England who specialize in the manufacture of soap have their own whalers, who are able to extract on board the oil from the blubber and store it in tanks until their return journey. The residue from this extraction is also now retained and converted into fertilizer, although at one time it was thrown back into the sea.

In so far as the Bristol area is concerned, imports have heretofore been very small, there being certain quantities of whale oil imported in 1919, but nothing in 1920, 1921, or 1922 of any importance. The major imports in this area are in the form of "hardened" oils—i.e. fish oils after hydrogenation has taken place. In so far as Cardiff area is concerned, only small quantities of fish oil imported were used for blending with mineral oils in the making of burning and lubricating oils.

DEMAND AT PRESENT TIME

Some well-known general import houses who in the past have specialized in vegetable oil are interested in Canadian fish oils of every description including the following specification:—

No. 1 Whale Oil.—This is an oil analyzing under 2 per cent free fatty acids and under 2 per cent combined moisture, impurities and unsaponifiable matter. It is a light-coloured oil, and produced in very large quantities in British Columbia.

No. 2 Whale Oil.—This is an oil guaranteed under 5 per cent in free fatty acids and under 2 per cent combined moisture, impurities and unsaponifiable matter.

Salmon Oil runs reddish in colour. The No. 1 oil is guaranteed under 3 per cent F.F.A. and under 2 per cent M.I.U. The next grade is No. 2 oil, and is guaranteed under 12 per cent F.F.A. and under 2 per cent M.I.U.

Pacific Coast Dog Fish Oil.—This oil is guaranteed to analyze under 2 per cent in F.F.A. and under 2 per cent in M.I.U.

C.i.f. quotations on the above may be forwarded to the Bristol office, for United Kingdom, Dutch, and German ports. British firms interested are prepared to work either as brokers or as principals.

SHIPPING REQUIREMENTS

In so far as the indent business is concerned, one large firm state they are in the habit of buying whale oil in full cargoes in tanks with an option to discharge the cargoes at Rotterdam, Schiedam, Vlaardingen, Maasluis, Brake, or Hamburg. It may be impossible to ship sufficient to fill a tank steamer, but if so it might be possible to obtain freight space in deep tanks, failing which quotations should be forwarded for the oil in wooden barrels or iron drums. It is naturally preferable to obtain the oil in bulk owing to the labour involved in handling packages.

BRAZILIAN PUBLICATIONS AVAILABLE FOR CANADIAN FIRMS

Mr. E. L. McColl, Canadian Trade Commissioner in Rio de Janeiro, has written stating that he will be pleased to send sample copies of the following Brazilian publications in English to any interested Canadian exporters: *Wileman's Brazilian Review* (a weekly journal of trade, finance and shipping); the *Brazilian American* (weekly); and the *British Chamber of Commerce Monthly*. As these publications carry the advertisements of reliable importing and exporting houses, it is thought they may be of interest to Canadian manufacturers interested in the Brazilian market.

FOOD PRODUCTS FOR BRITISH MALAYAN MARKETS

Trade Commissioner A. B. Muddiman

Singapore, April 24, 1923.—In carrying on its work during the past two months, this office has been called upon to make a number of investigations into some food products required in Singapore and other British Malayan markets. It should be noted that these remarks are applicable only to British Malaya, and have no reference to the Netherlands East Indies, which is a much larger and richer marketing field for products.

CHEESE

There are ten kinds of cheese on the Singapore market. One of these is a Canadian cheese packed in tin containers. There is no large demand for any particular cheese, due to the fact that consumption is practically limited to the Europeans. The Chinese—the bulk of the population at Singapore and in the Malay Peninsula—do not eat it. Thus, increased cheese sales depends on the gradual but small increase of its British consumers. Cheese manufacturers should note that cheese (tinned or loaf) will not keep, it is stated, in the tropics, unless the cream is expressed.

HAMS

Although, owing to her favourable geographical position, Australia is able to ship foodstuffs to Singapore under advantages not enjoyed by Canada, there is no reason to neglect this market. Australian foodstuffs are not always perfect. English hams are, for example, often preferred to Australian, and are well in evidence. Consequently, if satisfactory shipping facilities, at a later date, are afforded between Canada and this area, there is no reason why Canadian hams and other produce should not also make some headway. One importer in the Orient of Australian bacon and hams has stated that sometimes microbic influences may ruin a shipment unless the bone is sterilized.

FLOUR

It is perhaps in flour that Canada should first make an attempt to enter this market, if Australian prices can at all be met. If flour mills are established at Vancouver, Canada might be well able to take a part in this Oriental flour trade. Of course, as it is very difficult to estimate actually the number of wheat consumers in this home of rice consumers, no fantastic dreams as to the size of this trade must be cultivated. The great wheat and flour trade will always remain with European lands, and not here. However, there is a fairly considerable trade capable of being attacked. Samples of flour sent should be as white as possible, as the Chinese like white-looking flour. Canadian flours are, perhaps owing to their gluten content, not so snowy white as some others. Further, it should be remembered, kneading here is hand work. Samples must be renewed at fixed intervals, as in this malevolent climate flour has a tendency to bleach or to go mouldy. For those interested, the following are quite recent prices, at the time of writing, for various Australian whites: Frog brand, \$3.45; Beetle, \$3.25; and A.T.C., \$3.30 (Straits currency). The flour comes in white bags of 49-pound weight.

Any Canadian mill which cares to consider this business with its possible greater ramifications in Java, where about 40,000 tons (long) are imported annually, principally for the area around Batavia, must remember above all that not only is it a question of price but of a fixed date of delivery. Through

transportation companies, the export offices of the mills must assure themselves that they can deliver on receipt of order within so many days, either at Singapore or Batavia. This is absolutely vital. This office has already taken up this question with the Hong Kong office of one of the largest Canadian companies, who have regular sailings into that port, where in that case, if this routing is employed, the flour would have to be transhipped to feeder services. It is gratifying to note that this company is fully alive to these facts.

CANNED PILCHARDS

This office has already sent in an inquiry for canned pilchards (as they are called here) or "sardines" (as they are sometimes called by some Californian canners). There should be a good business here.

The "Ayam Brand" put up in California is the type wanted. The price to wholesalers ranges from \$8.30 to \$9 (Straits currency). The price to the retailers to-day is \$10.25, and the retailing price to the consumer is from 25 cents to 30 cents per tin.

The shape of the tins is flat ovals, 15 ounces, pack 4-6. The label must read "Sardines." The pilchards or "sardines" are packed in tomato sauce, sometimes in oil. The tomato sauce brand seems more popular. Packing is 48 tins to one case and the above prices are per case c.i.f. Singapore.

Both in British Malaya, the Netherlands East Indies and in Siam there should be, for a Canadian firm willing to assist its agents, a really good opportunity.

The Singapore office is in a position to place Canadian exporters in touch with really live agents in that city.

DRIED FISH

Dried fish is always in demand for the large Chinese trade in this area. At the present time six different kinds of dried fish are on the market. The price for these ranges from \$13.50 to \$26 (Straits currency) c.i.f. Singapore per picul. The packing is in picul barrels.

The only way to catch this market, as in the case of canned pilchards, is not to send in, as some Canadian canners are doing, their monthly circular letters, which only go into the waste paper basket, but to send a case of samples with a quotation that can meet prices given above. Agents at this end are anxious to obtain a connection with firms who are willing to do this. They are absolutely uninterested in any firm that merely circularizes them.

A picul is 133⅓ pounds for this area; but it should be noted that a picul for the Netherlands East Indies is 136 pounds (avoirdupois).

SALTED SALMON

It is the common belief among the agents and importing houses here that salted salmon would prove too dear for the Chinese fish trade.

EVAPORATED APPLES, ETC.

There is a good demand amongst the European element and some of the richer Chinese for evaporated apples. Canadian exporters of these products should be able to compete in price, and this office is in touch with several firms who would be glad to receive samples and prices c.i.f. Singapore. It should, however, be noted by Canadian exporters of dried apples and evaporated apples that the higher class goods should be only rings. Pieces are not wanted. Evaporated apples packed in quarters, however, would be considered.

There is one new feature in exporting these lines to this area: the dried apples should be sent in 5-pound tins. This is to prevent the intense humidity of the air getting into the evaporated fruit and spoiling same. Tins should be hermetically sealed. Other kinds of canned fruit wanted include peaches, pears, and apricots. These all should be packed for this area and the whole of the Netherlands East Indies in 5-pound tins. If Canadian exporters will consider for one moment the intense heat and humidity of this particular part of the world, they will at once recognize the necessity of this packing.

REPRESENTATION IN JAPAN

Trade Commissioner A. E. Bryan

Yokohama, April 15, 1923.—The sale of Canadian goods abroad begins of necessity at home. In other words, before embarking actively on this business the manufacturer should be certain that he possesses the necessary facilities for properly taking care of orders which may be received from foreign sources.

Some time ago this office received samples and catalogues from a Canadian firm and succeeded, in spite of the fact that no prices were quoted, in interesting a good importer to the extent of placing a trial order, only—and after much delay—to receive a letter saying that the order could not be executed, as the firm in question found they did not have the proper facilities for looking after foreign business. The establishment of a department to take care of this trade is something that cannot be done hurriedly; it takes time, and the longer and the more intensive work that is put into the establishment of this branch of service, the better will it be able to cope with the many exigencies that are encountered in exporting, but which are not met with in ordinary domestic business. When a firm has the necessary machinery installed to attend carefully to all the little but yet important features in connection with quotations, samples, documentation, consular invoices, etc., it should then proceed cautiously to exploit the most attractive market for its products.

CANADAN TRADE COMMISSIONERS

If the intending exporter will write to the Canadian Trade Commissioner in the field which he wishes to explore, just as fully as he would to a prospective client in the home market, sending catalogues and quotations, etc., he will receive in due course information obtained at first hand as to whether there really is a good opening for his product. He will also probably be advised as to the best manner of entering the market, whether to send out his own salesman or simply to send out samples and full particulars to an agency of some kind already on the ground, and if the latter, who and where. Through co-operation with this office a number of Canadian manufacturers have successfully broken into this market, and in some cases direct representation has been secured.

TRAVELLING SALESMEN

A firm may decide that the best way to secure good representation is to send out their own salesman to look over the ground, meet prospective customers, and make the final decision as to what form such representation shall take. Cases have come to the notice of this office, in which such a representative has been, to say the least, unacceptable, not at all the type of man to attract or hold the respect of the Japanese buyer. The man who can find nothing better to talk about than to criticize conditions as he finds them in Japan, the " fresh " type of salesman, the loud fellow who drops into an office for the first time and tries to put a sale through in a few minutes; failures such

as these reflect not only on the general body of Canadian manufacturers, but what is even more regrettable, are hurtful to the good name of Canada.

SELECT YOUR BEST MAN

If the president or head of the firm is unable to make the trip himself, then the next best man should be chosen—a man in whom every confidence is felt that he will represent the best interests not only of his firm, but of Canadian manhood. The Canadian manufacturer will inevitably be judged by his salesman. Speaking particularly from the standpoint of Japan, the essentials of a successful salesman or firm's representative in order of importance are: integrity, patience; ability; courtesy; feeling of patriotic responsibility; and knowledge of the language. The foreign salesman must also be a good mixer. He should be exceptionally versatile as well as ingenious. To appraise his customers, he must be a diplomat and a psychologist. In Japan also, perhaps more so than in any other country, the efficient salesman must know how to entertain and how to act when entertained—in other words, he should be a gentleman in every sense of the word.

VARIOUS KINDS OF REPRESENTATION

After the salesman has been in Japan for a month or more, he will be fairly well posted as to what is required and who the best firm or agent is to undertake the exploitation of the goods. If the proper salesman is chosen in the first place, he will be big enough for his job so that his judgment will be made the basis of the working policy to be adopted by the firm in catering to the market requirements of Japan.

Foreign products reach this country through various media, all of which must be considered when deciding on the basis to be followed. These trade intermediaries may be listed as follows:

(1) Branch office of exporter or manufacturer in Japan.
(2) Branch house of Japanese importer in Canada or United States (may be either Japanese or foreign house).
(3) Canadian commission firm.
(4) Foreign import commission house in Japan.
(5) Japanese import house or commission merchant.
(6) Local agent (foreigner).
(7) Local agent (Japanese).
(8) Merchants as agents.
(9) Manufacturer's agent.
(10) No special agent.

(1) BRANCH OFFICE IN JAPAN

Although entailing far more organization and greater effort on the part of the manufacturer, the branch house is after all the logical way to obtain business. This however may be too expensive for the average manufacturer to undertake until he feels assured that it will pay its own way. It all depends upon the product to be sold and the market for it in a given territory, whether such procedure is to be recommended, but the branch has many advantages, particularly in the case of Government contracts.

Take the case of a steel manufacturing firm who have a good range of railway materials among their products. If they wish to get their share of what business is offered, it is incumbent that they have their own office in Japan together with an efficient staff of engineers in a position to work on inquiries and specifications and get their quotations ready and in the hands of the various purchasing departments within the allotted time. The Imperial Government railways, as well as all other Government departments, issue and

close their tenders within a period of two weeks. This does not allow sufficient time for specifications and complete particulars covering an inquiry to be sent to Canada by mail, so that most of the large American, British and European companies have their own offices in Japan with capable engineers who can themselves prepare estimates and drawings and supply all particulars without referring to head office at home, except for confirmation of contract.

It is impossible for any firm to get this Government business until it has been placed on the approved list to fill such inquiries as are issued from time to time. This requires the special attention of a competent manager who can secure the confidence of his buyers and who is always on the ground to see that the desired service is given to his customers, both in offering advice and also in straightening out any claims or troubles that may arise.

A short time ago a firm in Canada wrote rather indignantly to this office because they had not been cabled regarding a tender that had been issued for a large quantity of railway material. As a matter of fact, the sale was completed by an American firm who were on the approved list of suppliers, who had sold large quantities of similar material in the past, and who had their own office and engineers in Japan ready to contract on Government tenders. The Canadian firm, on the other hand, had neither office nor representative on this side, while they were not on the approved list of suppliers, nor had they ever sent a man out to study the requirements of the market.

The branch office has many other advantages. A firm is assured of service, that some one is working for them at all times, and they are in a better position to compete on the market, as extra commissions of all kinds are cut down to the minimum. They are also better equipped to be advised of all changes or events of importance that affect the sale of their goods, and can take better advantage of any " breaks " in the market. Another important advantage is the fact that the Japanese prefer to buy direct from the manufacturer. They wish to get as near to the base of supply as possible in order to obtain the best price and sell at whatever additional figure the product will stand in order to face competition. Better service can also be given to buyers than through an agent, particularly on manufactured products that may require technical knowledge to explain.

(2) BRANCH OF JAPANESE IMPORTER IN CANADA

Many products have been successfully sold in Japan through the medium of branches of Japanese or other foreign houses located in Canada or the United States. Indeed in some cases it was due to the fact that such foreign house, with instructions at hand to buy a certain product, first approached a manufacturer and ultimately purchased from him for shipment to Japan. This would seem to be the line of least resistance: to sell to a branch house in Canada of a firm in Japan which presumably knows the conditions of the market and would buy the merchandise outright, thus taking all burden off the shoulders of the manufacturer as regards any financing. Such purchases are very welcome to the manufacturer as there is little, if any, risk regarding claims, etc., the goods being inspected and purchase completed before shipment.

On the other hand there are some objectionable features, particularly for the firm that is interested in their goods after they leave the factory and wish to build up a growing trade. In the case of Japanese houses, there are only a very few that have offices in Canada, and those that have not the most important. Many branches of large Japanese concerns are located in the United States at New York, Seattle, Portland and San Francisco. This applies generally as well to other foreign houses, while there is not one Canadian export firm, so far as the writer is aware, that has its own office in Japan. These houses being so few or scattered throughout the United States, are not likely to give Canadian

manufacturers much attention unless they cannot obtain their requirements from some American manufacturer located nearer to them. This does not, of course, apply where Canada has natural advantages such as in the matter of wheat, flour, lumber and nickel, where the Japanese or other branch house in New York or elsewhere will send its own buyer to the place of production to arrange for supplies, but in the majority of cases Canadian manufacturers never get a chance to quote simply because the deal is completed south of the line. And where Canadian products are shipped out through the medium of firms located in the United States, they are usually credited to that country in the official import returns issued in Tokyo.

Another disadvantage in selling these houses is that it is often impossible to come to any satisfactory arrangement for representation in Japan, owing to the fact that they prefer not to be tied down in a way that would keep them from buying where they can do so cheapest. Sometimes, however, a head office in Japan advises its American house to purchase certain brands already known to the trade, but in many cases it is left to the discretion of their buyers, one of the salient reasons for the maintenance of such foreign branch being to buy when and where they can most profitably.

(3) THE CANADIAN COMMISSION HOUSE

During the last four years there have sprung up in Canada, particularly at the ocean ports, a few good commission houses or export firms formed for the purpose of buying Canadian goods and selling them on overseas markets. So far as is known, none of these firms have their own office in Japan but work through arrangements made with similar commission houses in Japan that are not represented in Canada. Some of these firms are strong and reliable, and have established a good name for themselves in foreign markets, others unfortunately through various causes have fallen by the wayside.

The Canadian manufacturer should choose a firm that he has every confidence in before entrusting them with the sale of his products. As has been already stated, a manufacturer is judged by the man who sells his goods, and therefore it is important that no arrangements be made with any export house until he is assured of the facilities that this commission house have at hand for looking after his interests properly. Credit rating, experience in the handling of export shipments, connections abroad,—all should be carefully examined beforehand.

A manufacturer should never commit himself to the representative of an export house before thoroughly examining the applicant who wishes to sell his goods. In Japan there is no one to speak for his goods except this export agent and the goods themselves. Export price lists, samples, etc., should not be given him until a thorough investigation has been made of the standing of the firm both at home and abroad. By so doing the way is paved for the opening of a branch office, should that policy be later decided upon.

The most desirable type of Canadian commission house is the one with its own office in Japan. So far there is not any, but a splendid opportunity exists for a real Canadian import and export house with head office in Canada and branches in Tokyo and Osaka, established along the same lines as many of the British and American firms already in operation. Such a house equipped with a Canadian staff and a few good agencies, together with adequate financial backing, would find plently of scope for its activities and would command the attention of important Japanese buyers as well as of Canadian manufacturers.

In the case of the majority of Canadian commission houses, they are working through the medium of Japanese or foreign houses already established on this side. This is not very satisfactory for the reason that it usually

is a temporary arrangement and of short duration. A representative may come out to Japan; and in the ten days or so that he is in that country he makes a tentative arrangement with some local importer to send him a few samples and quote prices, after which he goes on his way. What happens? The samples may come or they may not, but the chief trouble is that the person who did the preliminary work is not able personally to look after things, with the result that dissatisfaction may develop before the business gets even started. On the other hand, there is a possibility that the firm in Japan may in the meantime receive samples from elsewhere and be working on them instead of the original. That is, if a firm have no sole representative, business may not be forthcoming because another company with their own office in Japan are getting orders for the same merchandise. On the other hand, there are certain export houses with men in charge who have been in Japan and spent considerable time in that country, who perhaps come over every year or so to see that all their connections are satisfactory and in good standing, and manufacturers should be able to work through these houses to mutual advantage.

Firms located on the Pacific coast have an exceptionally good opportunity for playing the role of exporter from Canada to Japan, being in a favourable position to see that freight is forwarded on the proper steamer, at the right time, and that documents are in order and on the same steamer as shipment—a most important detail.

When an exporter gives his agency to one of these reliable Canadian export houses, he must treat such a firm as he would their own export department. That is, supply them with samples and catalogues, and keep them fully supplied at all times with latest prices and notify them of any changes that may take place in their manufacturing arrangements.

A Canadian export house recently sent their representative to Japan who carried several different lines. The writer was much surprised to find that he did not have catalogues of an important line he was supposed to be carrying, while in another case he had no samples of one of the most saleable products which one of his principals manufactured, and which had been exported to Japan. Neither did he have prices, and when he cabled to his office for them, his request received no acknowledgment in the ten days that intervened before he left Japan.

(4) FOREIGN IMPORT HOUSES IN JAPAN

Foreign import houses in Japan are those import and export commission houses other than Japanese, who have built up their organization within the country.

When Japan was first opened to foreign trade in 1870, there were no firms native to the country who knew anything about foreign commerce, and at first all intercourse with the outside world was done through the medium of those foreign traders who first set themselves on its shores. As a result there are to-day British, American and Dutch houses who have been established for forty years or more, while there are one or two British houses that are even older. While Japanese firms, later entering the field, have shown remarkable expansion, the foreign houses still play an important role in the volume of overseas trade.

Being for the most part long established, these firms are thoroughly familiar with the customs and requirements of the people, and have an established clientèle. In many cases they hold agencies which they have been working for years past. For this reason it is sometimes difficult for a newcomer to interest them in a Canadian product, as they may be already agents for similar goods produced elsewhere, yet it not infrequently happens that they are quite open to sell Canadian goods, and this office has been successful in securing business through the co-operation of such houses. They usually have

their own offices in two or three places in Japan; the various departments are in charge of a foreign manager with Japanese salesmen (*bantos*) under him. Practically all foreign houses in Japan are more or less dependent on the Japanese salesmen who are responsible for the orders that are booked, the foreigners in charge supplying prices and relative information, and seeing that the financing is properly cared for and that the contract is in order.

The practice of these foreign houses is to issue letters of credit to cover all purchases and sell to the customers on a 30 to 60 days' sight draft or promissory note. This of course depends on the customer, and does not so much concern the Canadian manufacturer, who is paid cash on presentation of documents. It is very satisfactory for the Canadian exporter to know that he is trading with firms that he can thoroughly trust at all times.

On the other hand, it is sometimes found that these large foreign houses, already in an assured financial position, do not put as much vigour into the sale of a product, especially a new article, as can be obtained through the means of some other distributor. For this reason it must be made clear, when negotiating with such foreign import houses, that the goods must be pushed properly, that there must be no procrastination in the matter of looking for orders. A good plan is for the manufacturer to send out his own salesman to work in the office of the foreign import house. A representative on the ground cannot but act as an inspiration to the foreign house handling the goods, while the presence of a man from the factory is always an assurance of service. The majority of import houses, it should be stated, have their own specialities which they are particularly well qualified to handle, and they will usually be interested only in allied lines. It is important, therefore, before making any approach, to have some information on the products handled by the respective houses.

(5) JAPANESE IMPORT HOUSES

Many people in Canada have an unfavourable impression regarding Japanese firms in general. To say that there are no reliable firms in Japan to-day is just as far from the truth as to say that every house in Canada is trustworthy. In every city in Japan there are what may be called first-class Japanese import houses, reliable and strong financially, and able to put through any business they take in hand. There are also mercantile houses similar to Dun's and Bradstreet's, from whom reports may be obtained on the financial standing of any firm. In cases of trouble that have arisen this office has found that the exporter or manufacturer at home has been unduly impressed by the appearance of an elaborate letterhead, and has not taken the trouble to make the necessary careful inquiries.

It is well to emphasize the fact that there are good, efficient, and energetic Japanese import houses who are always interested in Canadian goods, because there is no blinking the fact that if business is to be increased with Japan, Canadian firms must more and more rely on the Japanese themselves and deal through Japanese houses as the logical manner of reaching the consumer, who after all is responsible for any trade that develops.

Japanese import houses are naturally in an excellent position to serve the Canadian manufacturer. They understand the demands of the market, they know the psychology of their own people, and the managers and heads being Japanese are closer to the real facts of a sale than is often the case with the foreign manager. If the firm are reliable, they get splendid support from their banks, which enables them many times to give long term credits to their customers without which the business might fall through. Their overhead expenses are generally less, with the result that they can usually sell competitively their foreign goods. They are in a better position to ascertain the financial standing

of the small buyer than is the case with other houses; occasionally they will carry stock for or on behalf of their clients; and being generally in excellent standing with the various Government departments, they seem to get preference in the case of Government tenders. Then again many of these import houses have their own branches in the United States and other parts of the world, which in a great way facilitate purchases and help clear up misunderstandings when these occur. Being comparatively young, they are generally not so booked up with agencies as some of the old-established foreign houses and who are thus unable to consider the representation of Canadian houses. They will issue irrevocable letters of credit, while occasionally other credit arrangements may be agreed to by the manufacturer under special conditions.

Much fruitful business has been secured through the co-operation of one of these Japanese firms together with a representative from the factory in Canada. The Japanese import house will give the representative a desk and office space and the use of his organization, including salesmen and financial accommodation, with the result that good business is usually to be had. This procedure is recommended to the attention of the Canadian manufacturers.

The fact must not be lost sight of, however, that the *general importer* is really an *indenter*, who will order from abroad anything that he gets an inquiry for and for which his clients will pay. Thus it may happen that a Japanese importer will bring in something he does not know anything about. Perhaps due to his own mistake, the wrong goods are shipped with the result that there is trouble. This class of importer should be avoided.

BE CAREFUL TO AVOID MISUNDERSTANDING

Japanese firms and foreign houses have this in common: they are all very keen on having their own special brands or makes of goods. It frequently happens that the first question a Canadian manufacturer is asked on going into an office, is whether he has taken the samples or laid specifications and prices before competitors. This sometimes gives rise to an embarrassing situation, especially when the representative has not only done so, but perhaps has even taken some sample orders. The importer takes the position, and naturally so, that he is not going to spend his time on a line of goods that one of his competitors may also be pushing. In other words, the one is not going to do any advertising for the other. The Canadian exporter must realize that all import houses, both foreign and Japanese, are in the first place competitors. Therefore, if it is desired to pick out the firm that is the best qualified to handle a certain line, great care and diplomacy must be exercised when interviewing the managers of the various concerns. There are in all lines certain large and better known local dealers who buy direct from these import houses. If the manufacturer leaves samples and prices in the hands of say two different importers, these dealers are almost sure to be approached by the salesmen (*bantos*) of both firms, and this, to say the least, creates unpleasantness, which is reflected in a cessation of orders.

(6 AND 7) LOCAL AGENTS

A few manufacturers place their agency in the hands of a single man who may or may not have had considerable experience in Japan. Such agent may be either a foreigner or Japanese.

Foreign.—Should a manufacturer visit Japan, he may choose some reliable man he has met, who has had experience in his line, and who is willing to leave, his present firm to take on the special work of looking after his interests. The greatest advantage in this case is that this agent, being the paid and personal representative of a manufacturer, is in a position to sell to any one, large import

houses and dealers alike. Being always on the ground and in touch with firms, he can take advantage of any inquiry offering. Such a representative, of course, cannot do his firm justice unless he is fully supported and receives the unfailing co-operation of his principals. To begin with, living costs are very high in Japan, and such an agent must receive a liberal salary, not less than $6,000 a year, with a commission. He must be treated liberally in the matter of travelling and entertaining allowances, and be given a furlough of six months at home at least every three years, or a year's leave of absence every five years. It must be admitted that good men to represent Canadian firms are not readily obtainable—that is, with the necessary experience and at the same time with an adequate knowledge of the country, its language, etc.

Japanese Agent.—While a Japanese agent may be had for half or less than half the cost of a foreign representative, generally speaking he is unable to swing business in the same way that a foreigner can do, for the reason that he is not so *persona grata* with the large Japanese buyers as is the type of foreigner just referred to. As a rule, the individual Japanese representative is not a success. He is overshadowed, so to speak, by the large Japanese and foreign import houses which may be representing a competitive line. He is inclined to work on a small scale and in a small way, pocketing any revenue that he may save by so doing. Individual Japanese agents are seldom met with in Japan, as manufacturers prefer, if dealing with the Japanese at all, to give their representation to one of the large Japanese import houses, which is the better principle on which to work.

(8) THE MERCHANT AS AGENT

There are in Japan, as in most countries, a few large and responsible merchants who import direct; for example, department stores handling different articles or large stores merchandising and specializing in certain lines. Giving an agency to such a firm occasionally has its advantages. Usually large orders are received, and instead of several or more risks, there is only one. Besides, the merchant agent may guarantee a minimum amount of business annually. Such a connection is looked upon with some satisfaction and pride by the manufacturer, if the merchant is well known and doing a large business, as it is a good advertisement for him.

On the other hand, one merchant will as a rule not buy from another, so that the products to be handled have only one outlet and the market to that extent is circumscribed. This office has recently arranged an agency of this kind, and it seems to be working out satisfactorily for all concerned as the department store likes the goods because they are popular with the consumer, and has placed several orders already. This kind of representation, however, is usually of interest only in the case of certain small lines, such as are sold in a retail way or in department stores.

(9) MANUFACTURERS' AGENT

There is another way of getting business, and that is through the means of a manufacturers' agent located in Japan who represents probably several other manufacturers of allied lines. Good men in this class are few and far between. Such an agent is paid on a commission basis, or he may get a nominal salary of a few hundred dollars a year and a commission on all business he turns in. This is very much the same as giving the representation to an important firm, with the exception that perhaps the import house has many other agencies and therefore cannot push a particular line to the same extent as the individual who has not so many lines to look after. Some manufacturers' agents, however, have their own offices with competent staffs, so that they are in reality themselves small import houses which give a little more personal attention to the manufacturer than the ordinary import house is able to afford.

(10) NO SPECIAL AGENT

There are a few standard lines well known to the trade, not only in Japan but all over the world, for which there is always a demand. Sales do not depend so much on ability of salesmen as they do on the stock on hand, it being simply a question of keeping enough on the market to supply the general demand and of trying to increase this demand by advertising propaganda.

In such cases the manufacturer generally has the list price, gives all foreign importers of that product the same discount, and sells to no one but bona fide wholesalers or importers. He will generally get more business than he would by confining the sale of his goods to one firm only, because in this way firms who are competing ordinarily in the domestic trade can buy at the same price such goods from the manufacturer, whereas one would not buy from the other in Japan. The proprietors of Waterman's fountain pens have no special agents in Japan, but sell to stationery shops by means of parcel post shipments. The sales manager, when he was in Japan a few years ago, informed the writer that they had never lost a dollar and were doing a very satisfactory business in this country.

REPRESENTATION CHART

The following chart may be of interest in designating the class of firms and the means by which many of them are seeking, and, let it be said, securing business in Japan at the present time.

Representation	For These Lines
1. Branch House in Japan	Lumber; Iron and Steel; Rails; Railway Material; Pulp and Paper; Packing House Products; Metals; Machinery; Specialties.
2. Firm's own Representative working with a Japanese or Foreign Import House	Pulp; Paper; Metals; Food Products; Lumber; Asbestos; Steel; Nickel; Aluminum; Wheat; Flour; Automobiles; Rubber Tires; Rubber Footwear; Gas Engines.
3. Japanese or Foreign Commission House	Paper; Pulp; Hardware; Milk; Butter; Cheese; Aluminum; Chemicals; Malt; Wheat; Flour; Woollens and Yarns; Grinding Stones; Confectionery; Rubber Footwear; Auto Accessories; Toilet Articles; Musical Instruments.

THE ITALIAN SITUATION

Assistant Trade Commissioner A. F. MacEachern

Milan, May 14, 1923.—Through the abolition of a number of ministries, under-secretaryships, and minor government departments which, it is estimated, will result in a saving of some 250 million lire during the fiscal year 1923-24, the Mussolini administration has given a practical demonstration of its determination to adhere strictly to a policy of economy, with the object of balancing the budget at the earliest possible date.

STATE CONTROL GIVING WAY TO PRIVATE ENTERPRISE

In opening the Second Congress of the International Chamber of Commerce in Rome, which was attended by delegates representing twenty-six countries, Premier Mussolini voiced his preference for private initiative in business, and his resolute opposition to restrictive legislation, which he termed as being fatally deterrent to economic progress. Evidences of adherence to this policy are not wanting. The Council of Ministers has approved a scheme submitted by the

Commissioner of Railroads, which sets forth the main lines to be followed in the gradual transfer of State railroads to private enterprise, and negotiations are now being entered upon for the transfer of the Sicilian lines. The Government monopoly of the life insurance business, which was enacted for a first period of ten years in 1913, has been abrogated, and the National Institute for Life Insurance, organized under that act, will continue its activities, but in competition with private companies, both Italian and foreign, which are, however, required to give 20 per cent of their business for the next ten years to the National Institute.

The decree providing for handing over the Italian telephone system to private companies was approved in February, and arrangements are now being made with Italian companies for carrying out its provisions. A measure proposed by the Minister of Finance, under which the Government monopoly on matches will be abolished, has been approved by the Council of Ministers, and it has been decided to make over to private enterprise the management of the important spas and baths at Salsomaggiore. In order to encourage the use of tractors in agricultural industry, the tax on mineral oils utilized for operating such machinery has been reduced from 29 gold lire per quintal to 10 gold lire per quintal, and the tax on rolls of paper for newspaper printing has been reduced to 2 gold lire per quintal.

Italy's credit abroad is becoming more stable, and, despite limitations of coal supply resulting from complications in the Ruhr, conditions in industrial circles have been fairly satisfactory, and improvement in the metallurgical industries has been specially noteworthy.

TAX EXEMPTIONS FOR NEW BUILDINGS

The law, which was passed several months ago, granting exemption from taxation for a period of twenty-five years on all new buildings erected, has given a strong impetus to the building construction industry, and it is confidently predicted that, as a result, the present acute housing shortage will be alleviated. Throngs of tourists, however, tend to keep housing accommodation at a premium, and great strides must be made in building construction before anything approximating pre-war conditions will obtain. Textile mills, especially those engaged in silk manufacture, showed marked improvement in the month of February. Investments in joint stock companies were valued during the month of March at 235,007,410 lire; some 132 joint stock companies were organized, and 99 increased their capitalization, while investment withdrawals amounted to 57,360,560 lire, thus leaving the net gain at 177,646,850 lire.

STATISTICS, EXCHANGE RATES, AND STOCK MOVEMENTS

Statistics published by the Ministry of Labour concerning industrial strikes during 1922 reveal a considerable improvement over conditions prevailing in 1921, a decline of 47·18 per cent being shown. Although imports during the month of January decreased by 259·5 million lire, as compared with the figures for January, 1922, exports for the same month showed an increase of 1,687 million lire over the corresponding month in 1922. Note circulation on December 31, 1922, showed but a slight increase as compared with the preceding month, and a slight drop was indicated on January 31.

The rate of exchange was 20·75 to the United States dollar on March 1, 1923, and was quoted at 20·07 at the end of the same month. Only a slight fluctuation was evidenced in April, and the United States dollar was quoted at 20·42 on April 30. A distinct upward tendency was evidenced in security prices during March, and this applied more especially to metallurgical and to textile securities. Of the eighty stocks quoted on the Milan Bourse, 50 moved up 1,297 points, 28 fell 571 points, and 2 remained stationary, while during the

last month a marked improvement was noted in bank shares and bonds. During the month of April, of the 80 stocks listed on the Milan Bourse, 31 moved up 617 points, 44 dropped 702 points, and 5 remained stationary. Wholesale prices increased 2·58 per cent during the month of March, when the cost of living showed a 1 per cent increase.

GREAT WATER-POWER PROJECT IN NEW ZEALAND

Specifications Issued and Tenders Invited

Mr. W. A. Beddoe, Canadian Trade Commissioner in Auckland, writes under date May 7, 1923, that the New Zealand Government have adopted a fixed water-power-development policy at an estimated outlay of £20,000,000. For a long period examinations have been made into the desirability of utilizing certain water-powers, and in the Auckland district Arapuni has been selected as providing the best source of power.

Government engineers have been engaged on preliminary work for some time and the Public Works Department is now prepared to invite tenders for the headworks.

Plans, drawings, and specifications on an elaborate scale have been prepared by the New Zealand Department of Public Works, and tenders are now invited for section 1 of the Arapuni scheme for headworks.

A summary of the scheme, as well as all particulars, may be obtained by interested Canadian firms on application to the Director, Commercial Intelligence Service, Ottawa.

TENDERS INVITED

New Zealand

Auckland, May 7, 1923.—Copies of plans and specifications have been received from Mr. W. A. Beddoe, Canadian Trade Commissioner at Auckland, for equipment for the Public Works Department, Wellington. These specifications are open for inspection at the Commercial Intelligence Branch of the Trade and Commerce Department, Ottawa. Tenders should be addressed to the Secretary, Public Works Supplies and Tenders Committee, Wellington, in accordance with these specifications.

No.	Date of Closing.	Particulars.
S.M. 165	June 19, 1923	*Waihao and Ohinemuri Rivers Improvement.* 7 $\frac{3}{8}$-inch plates with a total weight of 3,043 pounds. 48 $\frac{5}{16}$-inch plates, with a total weight of 41,760 pounds. 77 $\frac{1}{4}$-inch plates, with a total weight of 42,835 pounds. 74 flats, with dimensions ranging from 8-inch x $\frac{1}{2}$-inch x 9-ft. 9-inch long to 7-inch x $\frac{5}{16}$-inch x 430-ft. 0-inch long, with a total weight of 17,810 pounds. 3 channels with a total weight of 644 pounds. 165 angles, with dimensions ranging from 5-inch x 5-inch x $\frac{3}{8}$-inch x 7-ft. 6-inch long to $2\frac{1}{2}$-inch x 2-inch x $\frac{1}{4}$-inch x 1,100-ft. 0-inch long, with a total weight of 35,463 pounds. Rivets with diameter and length ranging from $\frac{5}{8}$-inch and $1\frac{1}{8}$-inch to $\frac{3}{4}$-inch and $3\frac{7}{8}$-inch and with a total weight of 106 cwt. 2 quarters.

STRUCTURAL STEEL FOR HULL OF DREDGE

The Canadian Trade Commissioner in Auckland, New Zealand, has also forwarded specifications for structural steel for the hull of a dredge, Waihao and Ohinemuri Rivers Improvement. Tenders close on June 19, 1923. A copy of these specifications will be sent to any Canadian firm interested on application to the Director, Commercial Intelligence Service, Ottawa.

Australia

Copies of tender forms and specifications have been received from Mr. D. H. Ross, Canadian Trade Commissioner, Melbourne, for equipment required by the Victorian Government Railway Department, Melbourne, and by the Department of Public Works of New South Wales, Sydney, Australia.

These tender forms and specifications are open to the inspection of interested Canadian manufacturers at the Department of Trade and Commerce, Ottawa (refer to file No. 27748).

Tenders in conformity to the specifications should be addressed, respectively, to the Secretary, Victorian Government Railways, Melbourne, and the President, Tender Board, Department of Public Works of New South Wales, Sydney, Australia.

Particulars of the requirements are briefly outlined thus:—

VICTORIAN GOVERNMENT RAILWAYS

No.	*Date of closing*	*Particulars*
35937	Aug. 1, 1923	Supply and delivery of internal grinding machine, complete with tools and accssories, as specified.
35933	Aug. 8, 1923	Supply and delivery of two three-phase alternating-current induction motors, starting apparatus, and accessories, as specified.

DEPARTMENT OF PUBLIC WORKS OF NEW SOUTH WALES

27	July 23, 1923	Supply and erection of pumping machinery and removal of existing temporary plant for water supply at Glen Innes, N.S.W. as specified. The new machinery is to be completely equipped with all necessary accessories.

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain.	†*Mauretania*	New York	June 19
" " "	:*Melita*	Montreal	" 20
" " "	*Montclare*	Montreal	" 22
" " "	:*Empress of France*	Quebec	" 23
" " "	*Doric*	Montreal	" 23
" " "	†*Berengaria*	New York	" 26
" " "	†*Paris*	New York	" 27
" " "	*Montcalm*	Montreal	" 29
" " "	‡*Empress of Britain*	Quebec	" 30
" " "	**Canada*	Montreal	" 30
Ireland only	‡*Marburn*	Montreal	" 21
"	‡*Marloch*	Montreal	" 28
France	**Ausonia*	Montreal	" 16
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela	*Caraquet*	Halifax	" 22
St. Kitts, Antigua, Barbados, Trinidad, Br. Guiana	**Can. Squatter*	Montreal	" 27
Bermuda, Bahamas, Jamaica, Colombia, British Honduras	**Can. Fisher*	Montreal	July 5
China and Japan	*President Madison*	Victoria	June 19
" "	*Africa Maru*	Victoria	" 22
" "	*Empress of Canada*	Vancouver	" 28
Australia only	‡*Sonoma*	San Francisco	" 26
Australia and New Zealand	*Makura*	Vancouver	" 29

† Letter mail only. * Parcel Post and specially addressed correspondence only.

‡ Letter and Paper mail only. : The *Melia*, *Empress of France* and *Empress of Britain* will also be used for direct mail for the Continent, including direct Parcel Post to France.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING JUNE 5, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement of the nominal closing quotations for all the principal exchanges for the week ending June 5, 1923. Those for the week ending May 29 are also given for the sake of comparison.

		Parity	Week ending May 29, 1923	Week ending June 5, 1923
Britain.. .. ..£	1.00	$4.86	$4.7295	$4.7251
France.. .. ..Fr.	1.	.193	.0676	.0663
Italy.. .. ..Lire.	1.	.193	.0489	.0478
Holland.. .. ..Florin.	1.	.402	.4005	.4005
Belgium.. .. ..Fr.	1.	.193	.0580	.0572
Spain.. .. ..Pes.	1.	.193	.1557	.1550
Portugal.. .. ..Esc.	1.	1.08	.0486	.0485
Switzerland.. .. ..Fr.	1.	.193	.1847	.1845
Germany.. .. ..Mk.	1.	.238	.000017	.000014
Greece.. .. ..Dr.	1.	.193	.0217	.0434
Norway.. .. ..Kr.	1.	.268	.1694	.1710
Sweden.. .. ..Kr.	1.	.268	.2722	.2718
Denmark.. .. ..Kr.	1.	.268	.1895	.1872
Japan.. .. ..Yen	1.	.498	.5014	.5042
India.. .. ..R.	1.	2s.	.3198	.3191
United States.. .. ..$	1.	$1.00	1.0234	1.0212
Mexico.. .. ..$	1.	.498	.4976	.4965
Argentina.. .. ..Pes.	1.	.424	.3607	.3625
Brazil.. .. ..Mil.	1.	.324	.1061	.1059
Roumania.. .. ..Lei	1.	.198	.....	.....
Jamaica.. .. ..£	1.	4.86	4.7461	4.7360
British Guiana.. .. ..$	1.	1.		
Barbados.. .. ..$	1.	1.		
Trinidad.. .. ..$	1.	1.		
Dominica.. .. ..$	1.	1.	.9825—.9831	.9804—.9829
Grenada.. .. ..$	1.	1.		
St. Kitts.. .. ..$	1.	1.		
St. Lucia.. .. ..$	1.	1.		
St. Vincent.... .. ..$	1.	1.		
Tobago.. .. ..$	1.	1.		
Shanghai, China.. .. ..Tael	1.	.708	.7675	.7455
Batavia, Java.. .. ..Guilder	1.	.402	.3914	.3906
Singapore, Straits Settlements...$	1.	.567	.5590	.5578

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Quebec, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1689. Flour.—A commission agent in Barbados would like to secure a Canadian flour connection. Would be purchasing direct in some instances, so as to supply customers from stock, and would also book orders to be shipped direct and paid for by his customers.

1690. Rolled Oats.—A commission agent in Barbados would like to handle rolled oats in barrels and 1 and 2 pound tins on direct purchases, and also on orders booked for customers.

1691. Oats.—A commission merchant of Havana, Cuba, desires to represent in the Cuban market, on a brokerage or commission basis, a Canadian exporter of oats.

1692. Cornmeal.—A commission agent in Barbados desires to obtain a Canadian connection for cornmeal, kiln-dried, finely ground, and reddish in colour.

1693. Buckwheat.—A Liverpool firm ask to be placed in communication with exporters of buckwheat.

1694. Peas and Beans.—A Liverpool firm ask to be placed in communication with exporters of peas and beans.

1695. Sugar Granulated and Moist.—A firm of commission agents and brokers in Amsterdam are desirous of representing Canadian sugar exporters for the sale of their products in the Netherlands. Firms attracted by this proposition should at once get in touch, giving all possible particulars.

1696. Sugar.—A Sheffield firm ask to be placed in touch with exporters of sugar.

1697. Dried and Evaporated Apples.—Canadian concerns interested in exporting dried and evaporated apples to Holland and desiring to be represented should communicate with a firm in Amsterdam.

1698. Codfish and Canned Fish.—A commission agent in Port of Spain, Trinidad, would like to obtain an agency for codfish and canned fish, including sardines.

1699. Canned Salmon and Lobster.—A firm in Amsterdam would like to hear from Canadian exporters of tinned salmon and lobster with a view to representation, etc.: terms and particulars.

1700. Canned Goods.—A manufacturers' representative and importer in Mexico City desires to secure agencies for canned goods, smoked fish, cheese, flour and condensed milk.

1701. Agency.—The agent of a Danish firm in Brussels desires to receive offers from Canadian houses for food products in wholesale quantities.

1702. Feedstuffs.—A commission agent in Trinidid wishes to represent a Canadian house for feedstuffs.

Miscellaneous

1703. Drugs.—A manufacturers' representative and importer in Mexico City desires to secure agencies for Canadian exporters of drugs, heavy chemicals and proprietary medicines. Correspondence in English.

1704. Phosphorite.—A Milan concern would like to import phosphorite from Canada.

1705. Antimony.—A Liverpool firm ask to be placed in touch with exporters of antimony.

1706. Dry Goods.—A commission agent in Trinidad would like to secure a Canadian connection for dry goods—including boots and shoes.

1707. Children's Clothing.—A firm specializing on the import of Canadian products desire to hear from manufacturers in a position to supply boys' suits, trousers, coats; also girls' dresses. These clothes for children from five to ten years old.

1708. Boots and Shoes.—A foreign import house desires to receive catalogues, samples and prices from Canadian manufacturers of a cheap grade of children's and men's shoes. A plain, substantial type of product, such as children's sandals and low shoes, as well as high. Willing to put on a special salesman if suitable connections can be made.

1709. Leather.—A manufacturers' representative and importer in Mexico Citp desires to secure agencies for fine leathers, such as kids and boxcalf, for use in the manufacture of footwear.

1710. General Agency.—A firm of sales agents in Trinidad are desirous of securing general Canadian agencies and would be glad to hear from firms interested in the export trade.

1712. Automobile Accessories.—A well-known and responsible business man in Mexico desirous to obtain agencies for Canadian manufacturers of automobile accessories of every kind. Correspondence in English.

1713. Solid Rubber Tires.—A firm in Melbourne desire to obtain solid rubber tires for heavy motor work. Particulars and prices on a c.i.f. basis desired.

1714. Road-Making and Concrete Machinery.—A well-known and responsible business man in Mexico City desires to hear from Canadian manufacturers of road-making and concrete machinery, with a view to acting as agent.

1715. Doors.—A Liverpool firm desire to open a connection with manufacturers to sell the above, on a brokerage basis.

1716. Egg Boxes.—A Dublin firm want to get in touch with Canadian manufacturers of box boards for egg boxes; the boards to be cut to the specification required by the Department of Agriculture in Ireland. Specifications are printed in the report in this issue (page 934). C.i.f. Dublin prices must be given.

1717. Paper.—A manufacturers' representative and importer in Mexico City desires to secure agencies for writing, book and bond papers. Correspondence in English.

1718. Wood Wool Shavings.—A Scottish firm of paper agents and export merchants, with several branches, are anxious to hear from manufacturers of wood wool shavings used for packing purposes.

1719. A firm of representatives in Milan would like to be put in touch with Canadian exporters of thermometers, safes, scales, harmoniums, textiles, cotton (cabots, drills, oxfords, zephyr, satins, etc.), cotton goods, and eventually act as their agents for Italy and the Italian colonies.

1720. Acetate of Lime.—A Turin company are anxious to open up a business connection with Canada.

1721. Caustic Soda, Mineral Oils and Tin Plate.—A Palmero firm would like to be put in touch with Canadian exporters.

1722. Caustic Soda and Gum Arabic.—A Milan firm desire to import from Canada.

1723. Chemical Fertilizers and Sulphate of Copper.—A firm in Catania, Italy, would like to communicate with Canadian firms dealing in the foregoing.

1724. Chemicals and Drugs.—A firm in Rome would like to import chemicals and drugs from Canada.

1725. Chemical for Industries and Aniline Colours are requested by a Turin concern.

1726. Chemical Products are requested by a Milan firm.

1727. Chemicals, etc.—A concern in Genoa carrying on business in heavy chemicals, tallow, linseed oil, linseed, vegetable oils, caustic soda, sulphate of soda, mechanical and chemical woodpulp would be glad to do business with Canada and secure the representation for Italy for Canadian woodpulp.

1728. Industrial Chemicals.—A firm in Genoa are willing to represent important Canadian firm handling industrial chemicals.

1729. Chemicals.—A Brazilian firm desires to get in touch with Canadian exporters of heavy chemicals. List available on application to the Department of Trade and Commerce, Ottawa.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From Montreal

To Avonmouth.—Colonian, June 16; Welshman, June 26—both of the White Star-Dominion Line.

To Liverpool.—Corinaldo, Cunard Line, June 15; Megantic, White Star-Dominion Line, June 16; Montclare, Canadian Pacific Steamships, Ltd., June 22; Kastalia, Cunard Line, June 22; Doric, June 23; Welshman, June 23; Canada, June 30; Regina, July 7; Megantic, July 14—all of the White Star-Dominion Line.

To London.—Bredon, Canadian Pacific Steamships, Ltd., June 16; Appomattox, Furness Line, June 16; Ausonia, Cunard Line, June 16; Hastings County, I.C. Transports, Ltd. June 18; Andania, Cunard Line, June 23.

To London and Antwerp.—Canadian Conqueror, June 20; Canadian Victor, July 4—both of the Canadian Government Merchant Marine.

To Southampton.—Melita, Canadian Pacific Steamships, Ltd., June 20; Manchester Corporation, Manchester Lines, Ltd., June 21.

To Cardiff and Swansea.—Canadian Leader, June 15; Canadian Challenger, June 29—both of the Canadian Government Merchant Marine.

To Newcastle and Leith.—Cairnross, Thomson Line, June 15.

To Dundee and Hull.—Cornish Point, Furness-Withy Line, June 19.

To Glasgow.—Saturnia Anchor-Donaldson Line, June 15; Marburn, Canadian Pacific Steamships, Ltd., June 21; Cassandra, Anchor-Donaldson Line, June 22.

To Havre.—Hastings County, I.C. Transports, Ltd., June 18.

To Antwerp.—West Campgaw, Rogers & Webb, June 15; Melita, Canadian Pacific Steamships, Ltd., June 20.

To Rotterdam.—Lisgar County, I.C. Transports, Ltd., June 14; Fanad Head, Head Line, June 27; Deuel, Rogers & Webb, June 25.

To Rotterdam and Hamburg.—Fanad Head, Head Line, June 27.

To Hamburg.—Lisgar County, I.C. Transports, Ltd., June 14; West Campgaw, Rogers & Webb, June 15; Empress of France, Canadian Pacific Steamships, Ltd., June 23; Fanad Head, Head Line, June 27; Deuel, Rogers & Webb, June 25.

To Norwegian Ports.—Fordefjord, Norwegian-American Line, July 15; a steamer, Norwegian-American Line, July 14.

To Copenhagen.—Arkansas, Scandinavian-American Line, about June 10.

To Copenhagen and Baltic Ports.—Aledo, Sprague Lines, June 15; Florida, Scandinavian-American Line, July 8.

To St. John's (Nfld.), via Charlottetown.—Canadian Sapper, Canadian Government Merchant Marine, June 21.

To St. John's (Nfld.).—Canadian Sapper, Canadian Government Merchant Marine, June 26, July 17, and fortnightly sailings.

To New Zealand and Australia.—Doonholm, New Zealand Steamship Co., June 16; Canadian Cruiser, Canadian Government Merchant Marine, June 26.

To South American Ports: Rio de Janeiro, Santos, Montevideo, and Buenos Aires.—Hilarius, Houston Line, July 1.

To South Africa.—New Brighton, June 15.

To Bermuda, Barbados, Trinidad and Demerara.—Borden, Canadian Pacific Steamships, Ltd., June 23.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—Canadian Forester, June 14; Canadian Fisher, July 5—both of the Canadian Government Merchant Marine.

To St. Kitts, Antigua, Barbados, Trinidad and Demerara.—Canadian Runner, June 13; Canadian Squatter, June 27—both of the Canadian Government Merchant Marine.

From Quebec

To Liverpool.—Megantic, June 16; Canada, June 30; Regina, July 7; Megantic, July 14—all of the White Star-Dominion Line.

To Southampton.—Empress of France, Canadian Pacific Steamships, Ltd., June 23.

From North Sydney, N.S.

To Newfoundland.—Kyle, Newfoundland Government Railway Commission, tri-weekly (Tuesday, Thursday and Saturday).

To St. John's, Nfld. (via Charlottetown, P.E.I.).—Canadian Sapper, Canadian Government Merchant Marine, June 21.

From Halifax

To Bermuda, St. Kitts, Antigua, Montserrat, Dominica, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad and British Guiana.—Royal Mail Steam Packet Co., June 22, and every fortnight.

From Vancouver

To Liverpool, London, Rotterdam and Antwerp.—Loch Goil, Royal Mail Steam Packet Co., late June, early July.

To London, Rotterdam and Antwerp.—Drechtdyk, Holland-American Line, June 28; Dinteldyk, Royal Mail Steam Packet Co., late July.

To Auckland, Sydney, Melbourne and Adelaide.—Canadian Scottish, Canadian Government Merchant Marine, June 20.

To Auckland, Melbourne and Sydney.—Wairuna, Canadian-Australasian Royal Mail Line, July 14.

To Wellington, Melbourne and Sydney.—Haoraki, Canadian-Australasian Line, Aug. 14.

To Honolulu, Suva, Auckland and Sydney.—Makura, Canadian-Australasian Royal Mail Line, June 29; Niagara, Canadian-Australasian Royal Mail Line, Aug. 3.

To Yokohama, Kobe, Shanghai and Bombay.—Canadian Winner, Canadian Government Merchant Marine, June 20; Canadian Transporter, Canadian Government Merchant Marine, June 30.

To India.—Canadian Winner, Canadian Government Merchant Marine, June 20.

To Kobe, Shanghai, Hong Kong and Manila.—Grace Dollar, Canadian Robert Dollar Co., June 10.

To Yokohama, Kobe, Moji, Shanghai and Manila.—Hawaii Maru, Osaka Shosen Kaisha, July 8.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Canada, Canadian Pacific Steamships, Ltd., June 28.

To Yokohama, Kobe, Shanghai, Hong Kong and Manila.—Harold Dollar, Canadian Robert Dollar Co., July 10.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Empress of Russia, Canadian Pacific Steamships, Ltd., July 12.

To Yokohama, Kobe, Moji, Shanghai, Hong Kong (also calls at Dairen, Manchuria).—Africa Maru, Osaka Shosen Kaisha, June 12.

To Yokohama, Kobe, Hong Kong, Manila, and Cebu, P.I.—Protesilaus, Blue Funnel Line, June 16; Achilles, Blue Funnel Line, July 14.

To Yokohama and Kobe.—Toyama Maru, Nippon Yusen Kaisha, June 22; Hakata Maru, Nippon Yusen Kaisha, July 13.

From Victoria

To Honolulu, Suva, Auckland and Sydney.—Makura, Canadian-Australasian Royal Mail Line, June 30; Niagara, Canadian-Australasian Royal Mail Line, Aug. 4.

To Manila (via Oriental Ports).—Admiral, Pacific Steamship Company, June 18, and every twelve days.

To Yokohama, Kobe, Shanghai, Hong Kong and Manila.—President Madison, Admiral Oriental Line, June 17; Empress of Canada, Canadian Pacific Steamships, Ltd., June 28.

To Yokohama, Kobe, Moji, Dairen, Shanghai and Hong Kong.—Africa Maru, Osaka Shosen Kaisha, June 22.

To Yokohama, Kobe, Hong Kong and Manila.—Achilles, Blue Funnel Line, July 26.

To Yokohama, Kobe, Moji, Shanghai and Manila.—Manila Maru, Osaka Shosen Kaisha, June 16.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Kaga Maru, Nippon Yusen Kaisha, June 12; Empress of Asia, Canadian Pacific Steamships, Ltd., June 14; Iyo Maru, Nippon Yusen Kaisha, June 30; Empress of Russia, Canadian Pacific Steamships, Ltd., July 12; Shidzuoka Maru, Nippon Yusen Kaisha, July 16.

HIDE AND SKIN INDUSTRY OF UGANDA

For some time past hides and skins have ranked as the most important exports from the Protectorate of Uganda, and potentially this market may be depended on to furnish 100,000 hides and skins annually. Unfortunately, Uganda hides, in common with those of East Africa, have a reputation for bad curing and for excessive branding on the most valuable parts. Propaganda is being directed towards better stretching, cleaning, and shade drying, and gradual improvement is anticipated, but the control of branding is a matter of great difficulty, although efforts are being made to restrict brands to the neck and shoulders. Investigations are also being made in respect of chemical agents which would accomplish the branding without damaging the skin. According to the American Consul at Nairobi, from 60,000 to 70,000 head of cattle may be slaughtered yearly for export in Uganda, without depriving the local inhabitants of their annual consumption or decreasing the herds. Towards the end of last year it was estimated that there were more than a million head of cattle in the Protectorate, while goats were estimated to number 700,000 head and sheep 250,000. Recently it was reported that British representatives have been investigating the cattle situation at Kenya and Uganda with a view to the establishment of a packing house to make the above-mentioned exportable surplus available. It is thought that a great deal could be accomplished by establishing trading centres with defined stock routes between those centres or buying posts. The costs of production to the native owner are small, and as soon as the great danger of disease is removed, there is no reason why by a proper system of collection such a packing house should not be able to compete favourably with Australian and South American trade.

PROHIBITION OF IMPORTATION OF POTATOES INTO CUBA FROM CERTAIN COUNTRIES

The following cablegram, dated May 30, 1923, has been received from the office of the Canadian Trade Commissioner in Havana, Cuba:—

"Presidential decree enacted absolutely prohibiting importation into Cuba of potatoes from Newfoundland, St. Pierre, Miquelon Island, Great Britain (including England, Scotland, Wales), Ireland, Belgium, Germany, Austria-Hungary, Mexico, due to potato wart sickness.

"Authorized importation of potatoes from Canada, Bermuda, Canary Islands; necessary that every shipment be accompanied by health certificate issued by any Canadian official agricultural authority vise Cuban consul or other consular authority stating shipment free from sickness plague. Every shipment inspected on arrival here before admission."

A report on this subject will be published in an early issue.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

Lucien Pacaud, Secretary to the Office of the High Commissioner for Canada in London, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada, and Newfoundland, 285 Beaver Hall Hill, Montreal, Que. Telegraphic address: "Britcom."

The British Trade Commissioner (for Ontario), 24 Adelaide St. West, Toronto, Ont. Telegraphic address: "Toroncom."

The British Trade Commissioner (for British Columbia), 210 Winch Bldg., Vancouver. Telegraphic address: "Vancom."

The Officer-in-Charge, British Trade Commissioner's Office, 703 Union Bank Bldg., Winnipeg. Telegraphic address: "Wincom."

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address Canadian.*

Australia

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil

E. L. McColl. Address for letters—Caixa Postal 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China

J. W. Ross. Address for letters—P.O. Box 300. Office—Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba

Address: 400 and 401 Teniente Rey 11, Havana. (Post Office Box 1290.) *Cable Address, Cantracom.*

France

Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland

Norman D. Johnston, Zuidblaak 26, Rotterdam, *Cable Address, Watermill.*

India and Ceylon

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan

A. E. Bryan, P.O. Box 109 ; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico

C. Noel Wilde. Address for letters, Apartado Num. 126 bis, Mexico City. Office, Edificio Banco de Londres y Mexico City Num. 30. *Cable Address, Canadian.*

New Zealand

W. A. Beddoe, Union Buildings, Customs street Auckland. *Cable Address, Canadian.*

South Africa

W. J. Egan, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements

A. B. Muddiman, P.O. Box 121, Singapore. (Territory covers Straits Settlements. British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

Douglas S. Cole, Acting Trade Commissioner, Sun Building, Clare street, Bristol. *Cable Address, Canadian.*

Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States

Frederic Hudd, 44 Whitehall street, New York City. *Cable Address, Cantracom.*

CANADIAN COMMERCIAL AGENTS

Australia

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark

C. E. Sontum, Grubbegd, N. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

Commercial Intelligence Journal

Vol. XXVIII June 16, 1923 No. 1011

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

Printed by F. A. ACLAND, Printer to the King's Most Excellent Majesty

902

TABLE OF CONTENTS

Commercial Intelligence Journal

Issued Every Saturday by the Department of Trade and Commerce

Ottawa **June 16, 1923** **No. 1011**

BRITISH EMPIRE EXHIBITION: NOTICE TO FOOD EXPORTERS

As already announced in the *Commercial Intelligence Journal,* plans for Canada's participation in the British Empire Exhibition to be held in Wembly Park, near London, England, from April 20 to October 31 next year, are practically completed.

Canada expects to have an exhibition worthy of its name. The Canadian Government exhibit will be under the direction of the Minister of Trade and Commerce, who for this purpose will have under his jurisdiction the staff of the Dominion Government Exhibition Commissioner.

This department therefore desires, as a preliminary announcement, to state that within the grounds of Wembly Park, where the great exhibition is to be held, will be constructed the Canadian Building. The Empire Exhibition Executive will also construct a special building to be used as a restaurant, in which products of the Empire only will be used, provided they can compete successfully in quality and price with similar foreign commodities.

It is anticipated that the exhibition will be visited by millions of people and a unique opportunity will thus be afforded for manufacturers and producers of foodstuffs throughout the Empire to advertise their products to the world.

Arrangements have not yet advanced sufficiently to permit of any detailed announcement, but it is desirable that it should be known among Canadian exporters of foodstuffs that the Department of Trade and Commerce is prepared in every possible way to assist Canadian suppliers of foodstuffs throughout the period of the exhibition. For this purpose it is suggested that firms interested, and who are not now represented in London or elsewhere in the United Kingdom, should arrange to appoint agents in London, to whom all information can be provided so that on short notice during the period of the exhibition prices and supplies can be made available. The department desires to make a special appeal, in view of the importance of the exhibition, to firms who supply foodstuffs, to supply only the best grade of products. Active steps are being taken in the other Overseas Dominions to win first place for their various products, and the keenest competition may be anticipated.

The Department of Trade and Commerce will provide a special officer detailed in London who will act as liaison officer between Canadian suppliers of foodstuffs and the authorities in charge of the restaurant.

Canadian firms, therefore, interested in supplying Canadian goods to the exhibition authorities, should communicate with The Deputy Minister, Department of Trade and Commerce, Ottawa, giving the names and addresses of their agents or jobbers in the United Kingdom and full information regarding the foodstuffs they can supply, so that arrangements may be made well in advance. The department will also welcome helpful suggestions.

CANADIAN EXPORTERS IN FORWARDING CATALOGUES SHOULD SEND DETAILS

Attention has been directed to several instances of recent occurrence in which Canadian exporters, in forwarding catalogues to Canadian Trade Commissioners regarding their products, have failed to include such data as would place these officers in a position to arouse the interest of foreign importers. It cannot be too strongly emphasized that catalogues should invariably be accompanied by such information as c.i.f. prices, or if these are unobtainable, then prices f.o.b. steamer, cubic measurements, ocean freight rates, etc., in order that Trade Commissioners may be enabled to discuss, with intelligence and some degree of fullness, the business of the exporter. Canadian exporters should furnish the foreign prospective buyer with exactly the kind of information they would themselves desire if they were in his place.

Manufacturers, when supplying Trade Commissioners with catalogues, should for obvious reasons send five or six copies instead of one, as in some cases they do.

THE HAMBURG FLOUR TRADE

TRADE COMMISSIONER L. D. WILGRESS

Hamburg, May 17, 1923.—Hamburg is an important centre for the distribution of Canadian and United States flour. The leading milling firms are represented by agents, who sell to importers in Germany, Czecho-Slovakia, Danzig, Poland, the Baltic States, and Finland. There are a number of first-class houses in Hamburg, who have connections for the distribution of flour throughout all this territory, while the principal dealers in these countries purchase a large proportion of their requirements through the Hamburg agents of Canadian and United States millers.

The unrivalled transport facilities provided by the railways, the river Elbe, and the coastal services to Baltic ports make Hamburg an excellent centre for distribution to all parts of the above countries, with the exception of the Rhine valley and South Germany, which can often be more conveniently served from Antwerp and Rotterdam.

QUANTITIES IMPORTED

Importations of flour into the Free Port of Hamburg during recent months have averaged about 300,000 sacks or over 15,000 tons a month. The following are the approximate figures for the last three months: February, 141,750 sacks; March, 335,838 sacks; April, 317,904 sacks. Of the total quantity imported during April, 87,364 sacks were received from Canadian ports, while it is probable that a fair amount of Canadian flour was also imported from United States ports and credited to the latter country.

PRESENT SITUATION

The importation of flour into Hamburg received a stimulus owing to the improved exchange value of the mark during March and April. During this period transatlantic flour was cheaper than locally milled flour and was therefore in active demand for German consumption. With the recent fall in the value of the mark the position has been reversed and foreign flour is now considerably dearer than local flour. As a result buying for German consumption

has practically ceased, and it is feared that with fairly large shipments coming forward there will be a glut on the market. Active speculation in foreign flour in anticipation of rising prices has also helped to bring about a situation which cannot be considered healthy.

DISTRIBUTION TO OTHER COUNTRIES

The bulk of the flour arriving at Hamburg is, however, usually destined for countries other than Germany. Czecho-Slovakia is a large buyer of flour from Hamburg, the dealers in that country purchasing from agents and brokers located at this port. Poland and Danzig also buy large quantities of trans-atlantic flour through Hamburg, and the same applies to the Baltic States of Latvia and Esthonia. Finland also takes large quantities, but Copenhagen and other centres compete for the Finnish trade. The tendency has lately been for Finland to buy a certain amount of flour direct from producing countries.

The following table taken from the Canadian trade returns gives the exports of Canadian flour to the above countries during the fiscal year ending March 31, 1922:—

	Barrels	$
Germany	51,343	319,232
Poland and Danzig	18,991	91,326
Latvia	8.931	64,594
Esthonia	1.136	5,147
Finland	83.580	566.641

GENERAL NATURE OF THE TRADE

Canadian and American flour was known in Germany before the war, but not in the other countries mentioned above. Czecho-Slovakia was supplied chiefly with Hungarian flour, and Poland and the Baltic States with Russian or locally milled flour. The demand for North American flour in these countries after the Armistice therefore resulted in a new trade being created. It was first necessary for millers to establish their brands on the market, since the trade was unfamiliar with the leading Canadian and United States brands. Advantage was taken of this situation by certain firms to introduce their brands early on to the market. In some cases fairly large consignments were sent to Hamburg with a view to making the brands known. The risks and pioneer work thus involved are now being rewarded, since there is a ready sale for established brands. These firms are thus able to do business for shipment in addition to sending over consignments when the occasion warrants.

A speculative factor has been introduced into the flour trade in Central and Eastern Europe since the war, owing to the many concerns now dealing in flour who were previously unacquainted with this trade. There is also a considerable amount of speculation in flour, as in other commodities, on account of exchange fluctuations and in anticipation of a drop in the exchange. The tendency, however, is for the trade to be more and more confined to a few leading importers thoroughly familiar with the flour business and for the more reckless operators to be eliminated, but speculation owing to exchange fluctuations is difficult to overcome.

IMPORTANCE OF BRANDS

The result of the above circumstances has been that the business in flour is based entirely on established brands. Importers and dealers decline to handle any brands not known on the market. The introduction of new brands is consequently a matter of considerable difficulty and much uphill work. The sending over of a few small consignments is often a necessary preliminary. After the brands are established business can be done for shipment and the more conservative exporters now decline to ship flour to Hamburg on consignment, confining their dealings to sales to the larger importers.

INFLUENCE OF THE EXCHANGES

The fluctuations in the exchange have a dominating influence over the business in North American flour with Central and Eastern Europe. Germany is only able to buy considerable quantities of foreign flour when the value of the mark is relatively stable. Any marked difference in the price of transatlantic flour as compared with the locally milled product leads to a cessation of buying for German consumption. In a similar manner the rate of exchange for the Czecho-Slovakia crown influences the demand for flour in that country, a fall in the value of the crown often being reflected in a lesser demand for the more expensive grades. The same considerations apply to the market for flour in Poland and the Baltic States.

The exchange fluctuations also affect the competition from other sources of supply. At times Hungarian flour is able to greatly undersell North American flour in the Czecho-Slovak market. Hungary is the natural source of flour supply for Czecho-Slovakia, but since the war has not been able to supply all the requirements of this market. Flour from French mills is also at times able to compete on the Czecho-Slovak market, when the rate of exchange permits the shipment by rail across Germany.

Another factor influencing the sale of flour to Central and Eastern Europe is the restrictive policy adopted by certain countries. The German Government has been endeavouring to restrict the importation of flour in the hope of encouraging the milling locally of a greater quantity of flour from imported wheat. It is found that, owing largely to the difficulties of financing purchases of imported wheat, the local mills are not able to supply all the requirements of the market and that the importation of some foreign flour is necessary, especially for mixing purposes and for pastry making. Restrictions on the importation of flour are being advocated in Czecho-Slovakia, but it is thought that effective measures cannot be long enforced.

It will be seen from the above considerations that the trade in flour with Central and Eastern Europe is of a highly fluctuating character and that Canadian mills cannot rely on the steady business which they are able to secure with other markets.

INCREASING POPULARITY OF CANADIAN FLOUR

Canadian flour is becoming better known in Central and Eastern Europe and some five or six brands are now established on the market. At first there was some prejudice against Canadian flour on account of it having different baking qualities from Hungarian and other flours to which the market in Czecho-Slovakia, Poland, etc., had become accustomed. Kansas flour was for this reason first in favour, being more similar to Hungarian. It has, however, now been shown that if mixed with a sufficient quantity of water Canadian flour makes a better bread and the prejudice against the longer baking quality of Canadian flour is being rapidly dispelled.

Flour milled from home-grown wheat in Germany and Czecho-Slovakia is of a low quality and strength. Canadian flour on account of its high percentage of gluten is consequently highly esteemed for mixing purposes in order to give greater strength. It is therefore purchased by local millers for mixing with their own products, and bakers also use Canadian flour in conjunction with other flours.

A certain proportion of the Canadian flour imported into these countries is sold for household use, mostly in small quantities at a time and seldom by the sack. The greater part of the Canadian flour imported, however, would appear to be used by millers and bakers.

The Canadian brands of Prima and Export Patent flour best known on the Hamburg market are "Nelson," "Famous," and "Homeland." These brands enjoy a ready sale and are in increasing demand. There are also some Canadian brands of Top Patents, e.g. "Glenora," on the market and are chiefly in demand for pastry baking. The established Kansas brands of Top Patents, however, realize 20 to 40 cents more per 100 kilogrammes, the trade so far having been more accustomed to this flour.

QUALITY OF FLOUR IMPORTED

The grades of flour imported into Hamburg from Canada and the United States are Top Patents, Prima and Export Patents, Straights, Fancy Clears, First Clears and Second Clears. Top Patents are used chiefly for pastry making, and there is always a limited demand for well-known brands of this grade. The bulk of the flour imported is, however, Prima and Export Patents, which are highly valued for mixing with local flours. The movement of the exchanges has a great influence on the grade of flour in demand. Thus the recent fall in the exchange value of the Czecho-Slovak crown as compared with the dollar has resulted in a greater demand for Straights and Clears, since Patents are now found too expensive for general use but are still in favour for mixing purposes. The grade of flour in demand for household or baker's use therefore depends largely on the fluctuations of the exchange and the price in local currency.

PRICES PREVAILING

The following table provides an indication of the prices per 100 kg. (220 pounds) being asked on May 5 for certain leading Canadian and United States brands of flour c.i.f. Hamburg:—

Top Patents—		
Kansas..		$ 7 60
Manitoba..		7 40
Patents—		
Kansas..	$6 75 to $7 10	
Manitoba..	6 85 to 7 20	
Straights..	6 60 to 6 80	
Fancy Clears..	6 50 to 6 60	
First Clears..	6 20 to 6 35	
Second Clears..	5 15	

Since May 5 prices have been reduced for the more expensive grades, the present sale price for Top Patents being approximately $7.15 c.i.f. Hamburg; for Prima Patents about $6.95; and for Export Patents about $6.75 per 100 kg. for representative brands.

PACKING

Flour shipped to Hamburg may be packed in jute sacks of 140 pounds or in cotton sacks of 50 kg. (110 pounds). Top Patent flour is always packed in cotton sacks. Ten cents extra is added to the price for cotton sacks, and in Germany most of the dealers handle flour in jute sacks in order to avoid adding to the price. In Czecho-Slovakia and Poland a larger proportion of the flour is sold, in cotton sacks.

DUTY

At present flour is admitted into Germany duty free. The former duty on flour was 18.75 marks per 100 kg. (220 pounds). There is also no duty at present on flour imported into Czecho-Slovakia, but a tax of 1½ per cent is levied for manipulation.

TERMS OF PAYMENT

The financing of shipments is the most difficult problem at present confronting Hamburg importers of North American flour. Canadian millers must exercise due care and discretion in their business with Hamburg, but it is sometimes a mistake to exact too stringent terms from houses of first-class repute.

Prices for flour are quoted in United States dollars and this is the currency in which dealers buy from agents and importers. For a time after the Armistice quotations in Dutch gulden were common as in the grain trade, but for over a year the practice of quoting in American dollars has become general. Canadian shippers should therefore quote c.i.f. Hamburg in United States dollars per 100 kg. (220 pounds).

Payment is usually net cash against documents. Sometimes an advance of 25 per cent is required with order. In other cases an irrevocable bank credit is opened in New York. The agent is sometimes made responsible for the transaction, but it is usual to draw direct on the importer or buyer of the flour.

The usual brokerage commission received by agents is 3 per cent, which is included in the price quoted to importers. The following is the translation of a sales note form used by Hamburg agents of North American millers for flour sold to importers:—

Herewith confirm having bought through the agency of

Quantity:

Article:
To be shipped in sound condition from the mills.

Price:

Discharging:
At one or more American sea-ports (Canadian and/or Atlantic and/or Gulf Ports) at sellers's option. The B/L and/or Steamer's Declarations date suffices as proof for time of shipment.

Delivery:

Place of Fulfilment:

Packing:

Weight:
Discharging weight as per B/L is final. 220 Amer. pounds=100 kilogrammes.

Payment:
The specified currency in the Sales Note net cash against shipping documents consisting of original B/L and/or B/L delivery order or delivery order of the shipping company or forwarding agents delivery order or delivery order of the quay authorities and insurance certificate and/or insurance guarantee. If otherwise not stated purchasers must on realization of business open an irrevocable bankers credit.

Other conditions:
Part shipments are permitted. Each part shipment to be considered as a special contract. In case through "force majeure" delay in shipment or delivery occurs, sellers are privileged to defer shipping and/or delivery date.

Stipulations:
War, revolution, disturbances, strikes, lockouts, works disorders, conflagrations at the sellers or their suppliers, flood, accumulation of ice, unforeseen import, export, and transit prohibitions, and alterations in the Customs regulations, regulations made by any Government or their officials; stoppages of ordinary shipping or railway facilities; insufficient or delayed supplies of raw material to sellers or to the works of their suppliers; delayed or insufficient ships' accommodation, shortage of wagons or any other causes which sellers are unable to eliminate, whereby shipping or delivery may be prevented, are to be considered as "force majeure," and release the sellers from present contract obligations without any indemnities.

REPRESENTATION

The appointment of a suitable agent, who is thoroughly familiar with the flour trade, would appear to be the first essential for Canadian milling firms desirous of securing a share of the business with Hamburg. It is necessary to

give the agent every inducement to push the sale of a particular brand and to assure him the exclusive representation of that brand for a number of years throughout the territory in question. Some millers endeavour to work through Dutch or other firms with sub-agents in Hamburg, but it is advisable to have direct agents in Hamburg covering Germany, Czecho-Slovakia, Danzig, Poland, Lithuania, Latvia and Esthonia. Finland may also be included in the Hamburg agent's territory or else assigned to another agency covering Scandinavia.

When an agent is appointed it may be necessary to send over a few small consignments of about a hundred tons each in order to introduce the brand on to the market. Great care has to be exercised to avoid consigning to Hamburg when there is a glut of flour in that port. After the brand is known on the market business can be done for shipment. There are some fifteen large importers in Germany and Czecho-Slovakia and every facility should be given to the agent to enable him to do business with these importers on reasonable terms.

The choice of a name for the brand is a matter of considerable importance, and it should not be assumed that a brand which is suitable for the British market will suit Central European requirements. The name of the brand should be distinctive, easily comprehensible to the various nationalities, and one not likely to be confused with other brands already introduced or which may later appear on the market. When the brand is established it is important that its quality should be maintained, otherwise much of the spadework will be spoiled and it will be necessary to begin over again.

SHIPPING AND PORT FACILITIES

Canadian millers shipping to Hamburg have the choice of a number of steamship lines, maintaining regular services between Canadian ports and Germany, e.g., Canadian Pacific, Head Line, County Line and the Rogers and Webb Line. The discharging and warehouse facilities at the Free Port of Hamburg are of the most approved modern character. The flour is unloaded directly into covered sheds which are provided with railway track connection. Flour for Czecho-Slovakia can also be directly unloaded into river barges for shipment up the Elbe as far as Taussig in Czecho-Slovakia.

The above is a review of the Hamburg flour trade from the point of view of the agents and importers at this port. The writer hopes in the near future to visit Czecho-Slovakia, Poland and the Baltic States, when advantage will be taken of the opportunity to investigate the flour trade from the point of view of the dealers in these consuming countries.

TENDERS FOR SUPPLIES TO THE NORWEGIAN STATE

As a result of representations made by Norwegian industries during recent years for preferential treatment of their tenders for government work steps have from time to time been taken to afford protection to home industries, says the *Anglo-Norwegian Trade Journal*. The Norwegian Government has now submitted a proposition, based on the report of a committee, to the Storthing, in which it is suggested that during difficult times for Norwegian industries no foreign tender for government supplies shall be accepted before the matter has been submitted to the Works Department. It will then rest with the Government of the day to decide what measure of preferential treatment they consider it possible to grant home tenderers beyond existing regulations.

The Committee which has been considering the matter has also made recommendations on the subject of regulations regarding the use of Norwegian materials for works subject to Government concessions and in cases where state grants are given to municipal authorities.

INDIA'S FOREIGN TRADE DURING FISCAL YEAR ENDING MARCH, 1923

TRADE COMMISSIONER H. A. CHISHOLM

VALUE OF EXPORTS TOTAL NEARLY BILLION DOLLARS

Calcutta, May 4, 1923.—The outstanding feature of India's foreign trade for the fiscal year ending March 31, 1923, has been the expansion in her merchandise export trade, which increased in value over the previous year by 28 per cent to a total of 314 crores of rupees, including re-exports, or not far short of a billion dollars. On the other hand, the value of imported merchandise decreased as compared with the previous year by 13 per cent to 233 crores of rupees. The balance of trade in merchandise was, therefore, in favour of India to the extent of over 90 crores.

HUGE IMPORTS OF TREASURE

Imports of treasure rose by nearly 100 per cent over the previous year to the huge total of 63 crores of rupees or nearly $200,000,000. About half of this total was in gold bullion, a sixth in gold coin, and a third in silver. Most of the gold and silver thus imported into India is made into ornaments, while some of it was buried away in the ground. Such large imports of treasure are indicative of the prosperity of the masses of India.

Value of India's Foreign Trade in Merchandise

Principal Countries.	Exports of Indian Merchandise. 1922 Rs. Crores.	Exports of Indian Merchandise. 1923 Rs. Crores.	Imports of Foreign Merchandise. 1922 Rs. Crores.	Imports of Foreign Merchandise. 1922 Rs. Crores.
United Kingdom	46.00	65.26	151.00	140.00
Canada	1.47	2.13	0.50	0.62
Australia	4.53	6.03	9.43*	0.97
Straits Settlements	7.45	7.50	4.07	4.47
Hong Kong	6.30	6.29	1.65	1.45
Ceylon	11.56	12.24	1.37	1.44
Total British Empire	91.25	118.24	177.00	156.00
Germany	16.27	21.91	7.24	11.90
Belgium	8.00	11.27	5.32	6.37
France	9.82	15.34	2.23	1.97
Italy	5.83	10.00	2.00	2.11
Java	4.03	3.12	23.71**	12.88
China	11.07	13.64	2.59	2.91
Japan	38.08	40.19	13.57	14.46
United States	24.90	34.33	21.60	13.21
Grand Total	231.38	298.84	266.34	232.59

* Representing abnormal wheat shipments.

** Representing sugar shipments.

NOTE.—A crore of rupees is equal to about $3,100,000 Canadian Currency.

INCREASED VALUE OF ALL INDIAN COMMODITIES EXPORTED

Nearly every class of goods exported by India shared in the expansion of the export trade, while every country in the world spent more money on Indian goods in 1922-23 than in the previous year. Italy and Spain were particularly noticeable for their greatly increased purchases of Indian produce especially in raw jute and cotton, oilseeds and hides. It is an interesting commentary on the prosperity of the Cuban sugar industry that Indian shipments of sugar bags to Cuba more than trebled in value over the previous year. France's increase in the imports of Indian products was relatively much greater than Germany's. Japan's imports increased only slightly but she is still India's second best cus-

tomer. The United States is a good third, and increased the value of her imports from India by 40 per cent over the previous year. The United Kingdom is easily India's best customer and buys as much from her as does the whole of Continental Europe.

Cotton.—Exports of raw cotton increased 10 per cent in volume, and 30 per cent in value, to 3,362,000 bales, valued at 71 crores of rupees. Nearly half of this total went to Japan while Continental Europe nearly doubled its imports of Indian cotton. India is now year by year increasing her cotton production and when the present irrigation projects on the Indus are completed India will probably increase her cotton production by another million bales per year.

Jute.—Exports of jute, raw and manufactured, amounted to 63 crores in value as compared with 44 crores the previous year. While exports of raw jute increased in volume only 25 per cent, there was a 50 per cent increase in value. Both the United Kingdom and the United States nearly doubled their purchases of raw jute. There was a 10 per cent decrease in the volume of bags and sacking exported, but an increase in value. Australia and Cuba are India's best customers for sacking. Exports of gunny cloth increased some 10 per cent in volume and over 50 per cent in value to 24·30 crores. The United States takes 70 per cent of India's total exports of gunny cloth. Canada's imports of gunny cloth from India increased in volume over 40 per cent.

Grain.—Indian grains exported during the year amounted to 42 crores in value as compared with 70 crores and 25 crores respectively during the previous two years. Rice represented three quarters of this total. Over two million tons were exported—an increase of 50 per cent over the previous year and 100 per cent over 1920-21. Germany, China, Egypt and Cuba greatly increased their purchases of Indian rice. Exports of wheat during the year amounted to 220,000 tons as compared with 81,000 tons during the previous year.

Oil Seeds and Nuts.—Indian exports of this class of produce increased 60 per cent to a total of 27 crores. The largest item here is that of groundnuts to the volume of 267,000 tons valued at 7½ crores, France purchasing 65 per cent of this total. Shipments of linseed increased 60 per cent in volume to 274,000 tons valued at 7·⅓ crores, the United Kingdom and France being the largest buyers. Exports of rapeseeds increased 90 per cent to a volume of 252,000 tons valued at 5½ crores, Germany and Belgium being the largest buyers.

Tea.—The volume of tea exported decreased 8 per cent to 288,000,000 pounds, but the value increased nearly 20 per cent to 22 crores. The United Kingdom of course consumes over 90 per cent of India's teas exported, while Canada is second amongst India's tea customers.

Lac.—This trade increased some 10 per cent in volume and 25 per cent in value to over 10 crores. Nearly 60 per cent of the lac exported from India goes to the United States.

Hides and Skins.—There was a slight decrease both in the volume and value of this trade, which amounted to a total of about 6 crores for the year.

Wool.—Over 52,000,000 pounds of wool were exported valued at 4½ crores as compared with 32,000,000 pounds the previous year and 23,000,000 pounds in 1919-20.

THE IMPORT TRADE—LIQUIDATION NOT YET COMPLETE

Imports of foreign merchandise continue to fall off both in volume and value in nearly all commodities. Every succeeding month now shows a further contraction in imports as compared with the preceding month. The import trade is everywhere dull, and importers show extreme reluctance about taking on new commitments or accounts unless some very extraordinary values are available.

"Retrenchment" is the word of the hour, and Government and industrial enterprises and individuals are limiting their expenditures to the bare necessities of operation. Liquidation has not yet completely run its course, either with respect to the solvency of trading firms or to overstocking of goods. The banks are still conducting forced sales of merchandise taken over from bankrupt firms and those which have failed to meet their drafts. Several important trading and distributing houses throughout India are keeping their heads above water only with the greatest difficulty and further casualties are expected this year.

The uncertainty of the situation is further complicated by the failure of the Alliance Bank of Simla, which closed its doors a few days ago. As a result, certain other banks in India are undergoing heavy runs on the part of their depositors. Fortunately, at the time of writing these banks are meeting all demands made upon them. The present policy of the Indian banks seems to be one of extreme caution. Credit facilities are considerably restricted not only by the careful attitude pursued by the banks, but by the high bank rate which remains at 8 per cent. Many sound undertakings are, it is said, being held up by this abnormally high rate.

While the great "East Indian" merchant houses continue to thrive and to make money out of the buoyant export trade, most of the smaller European and Indian traders in imported merchandise have had the extent of their operations and profits greatly diminished. Where they have not been forced into liquidation, their capital has in many cases been so impaired that they are able to finance only small shipments. The wise European exporter declines to give most of them credit and demands at least 25 per cent cash with order.

DIFFICULTY OF INTRODUCING CANADIAN LINES

Canadian exporters, who are making use of the facilities of this office, should bear these conditions in mind. When an importer cannot raise enough cash to finance a shipment of goods which he knows and has a market for, it is not likely that he can at once be persuaded to take up an untried line of Canadian goods at prices which are not always competitive. Good importers receive many offers from foreign exporters on every mail. And it is only by providing this office or the importer with full information, samples and attractive prices that a Canadian line of goods can achieve an entrance into this market.

There is every reason to believe that the world's requirements of India's leading exports such as jute, raw cotton, hides and skins, tea and lac will continue to expand. India's large surplus value of exported over imported merchandise is now represented chiefly by the almost unprecedented purchases by the Indian masses of gold and silver treasure. It is expected that this movement will return to normal proportions within a few months, and increased purchases of goods on the part of the Indian consumers will almost certainly follow. Both the banking and commercial communities throughout India are looking forward to a general revival in the import trade toward the end of the present year.

DETAILS OF IMPORTS BY COMMODITIES

Apparel.—Imports last year, 190 lacs*; previous year, 176 lacs. Japan was the only country increasing her business under this head, chiefly in cheap cotton hosiery. The American trade made a slight increase, particularly in "Union suits" of underwear and silk hosiery. The trade of both the United Kingdom and France declined.

Arms and Ammunition.—Imports last year, 63 lacs; previous year, 70 lacs. American sporting rifles and ammunition are now sold everywhere in

* A lac of rupees is equal to about $31,000, Canadian currency.

India and one American factory maintains a salaried representative in India. Many people who can afford to buy only moderately priced weapons generally buy American rifles.

Asbestos, manufactured.—Imports last year, 12 lacs; previous year, 12½ lacs—mostly packing and brake lining.

Belting.—Imports last year, 83 lacs; previous year, 100 lacs. Nearly all the imports are from the United Kingdom. About half of the machinery belting used in India is of leather, a sixth of cotton, and the remainder of coir and other composition. Owing to climatic conditions, rubber belting is little used in India.

Bobbins.—Imports last year, 58 lacs; previous year, 120 lacs. This trade is nearly all English, although a certain percentage of the trade is German. As a very high jute crop is expected this year, it is probable that a much larger quantity of bobbins will be required for the mills next winter.

Boots and Shoes.—Imports last year, 18 lacs; previous year, 15 lacs. Nearly all the imports are from the United Kingdom. American business in India is now of very small proportions and is confined largely to ladies' and tennis shoes. There is no market at present in India for men's leather shoes made in North America. Practically all the cheaper shoes are made in Indian factories and are retailed at from $1 to $1.50 per pair. When more expensive shoes are required they are usually hand-made in the country.

Brushes.—Imports last year, 10 lacs; previous year, 7 lacs. Cheap brushes are made in India, but they have some difficulty in competing with the low-priced Japanese article. Higher quality brushes are imported from the United Kingdom.

Cement, Portland.—Imports last year, 134,000 tons; previous year, 125,000 tons. Despite the very large expansion in the Indian cement industry, there was an increase in the importation of cement from abroad. The United Kingdom supplied 75 per cent of the cement imported by India, although German and Belgian business is increasing. Imports of Japanese cement were only a fifth of what they were the previous year.

Chemicals.—Imports last year, 201 lacs; previous year, 190 lacs. Imports of calcium carbide last year amounted to 24,600 cwt., nearly as much as that of the two previous years put together. Imports of ammonia and salt were double those of the previous year. Imports of disinfectants increased by 80 per cent to a total of 20,000 cwt. Other chemicals in which a good business was done include soda bicarbonate, bichromate, sodium carbonate and cyanide.

Cutlery.—Imports last year, 23 lacs; previous year, 17 lacs. Germany had over half of last year's business as compared with a third of the previous year's business. The United Kingdom is maintaining the better class trade, while American business has almost entirely disappeared.

Drugs and Medicines.—Imports last year, 166 lacs; previous year, 158 lacs. Imports of proprietary and patent medicines during the year amounted to 23 lacs, as compared with 20 lacs the previous year. Two or three Canadian preparations are now on the Indian market.

Dyes, Aniline.—Imports last year, 14,000,000 pounds; previous year, 11,600,000 pounds. Germany took 70 per cent of last year's business, as compared with 50 per cent in the previous year. Belgium's business increased, while dye imports from the United Kingdom fell away by 50 per cent. Dye imports from the United States amounted to about 5 per cent of the total.

Glassware.—Imports last year, 260 lacs; previous year, 222 lacs. Half of this business was in glass beads and bangles, most of which came from Japan and Czecho-Slovakia. The value of table glassware amounted to 10 lacs; of glass globes for lamps, 22 lacs; and of bottles and phials, 36 lacs.

Hardware.—Imports last year, 5 crores; previous year, 6 crores. Under this heading there was a great increase in the number of metal lamps imported, amounting to 2,800,000, as compared with 1,300,000 the previous year. The demand for builders' hardware, agricultural implements and tools was good. The value of German business in hardware with India nearly doubled as compared with the previous year, while the British and American business declined about 30 per cent. Japan also increased her hardware trade with India as compared with the previous year.

Electrical Goods.—Imports last year, 2 crores; previous year, 4 crores. There was a falling off in the importation of nearly all classes of electrical goods and apparatus. India's electrical business remains firmly in the hands of the United Kingdom. In 1921-22 the United States had 20 per cent of India's electrical business, but this percentage dropped in 1922-23 to 10 per cent of the total. American business showed some increases in the sale of batteries and bulbs for motor cars. German electrical business with India is increasing, but not to any very marked extent.

Liquors.—Imports last year, 342 lacs; previous year, 376 lacs. Over a third of the liquor imported into India is Scotch whisky. A fourth of the total is beers and ales, and a tenth wines. Imports of English beers and ales have decreased slightly and imports from Holland and Japan have fallen away sharply, while imports of German beers are steadily increasing.

Machinery.—Total imports last year, 23 crores; previous year, 34 crores.

(*a*) *Agricultural.*—Comparatively large importations of agricultural machinery were made in 1921-22 and in 1920-21 with the result that many of these stocks were held on hand during the greater portion of 1922. The value of agricultural machinery imported last year was only half that of the previous year and a fifth of that of the preceding year.

(*b*) *Electrical.*—Imports last year, 262 lacs, previous year, 390 lacs. The United Kingdom more than kept the lion's share of this business, while American trade decreased by more than 50 per cent. The largest items under this heading are motors, generators and transformers.

(*c*) *Boilers.*—Imports last year, 124 lacs; previous year, 255 lacs—practically all from the United Kingdom.

(*d*) *Mining.*—Imports last year, 40 lacs; previous year 73 lacs. The United Kingdom and the United States share this business equally.

(*e*) *Rice and Flour Mill Machinery.*—Imports last year 43 lacs, previous year 64 lacs, largely from the United Kingdom.

(*f*) *Textile.*—Imports last year 10½ crores; previous year, 13 crores—practically all from the United Kingdom.

Other classes of machinery imported into India with their values last year are as follows: oil crushing and refining machinery, 11 lacs; paper mill machinery, 14 lacs; refrigerating machinery, 8 lacs; sawmill and woodworking machinery, 10 lacs; sugar machinery, 17 lacs; tea machinery, 26 lacs. Of the total of machinery and mill work imported into India last year the United Kingdom supplied over 80 per cent, the United States nearly 10 per cent, while the remainder was mostly German and Swiss.

Matches.—Imports last year, 162 lacs; previous year, 203 lacs. Japan's share of India's match business has declined somewhat to about 70 per cent of the total. Sweden has nearly all the rest of the business.

Metals.—Total imports last year, 25 crores; previous year, 26 crores.

(*a*) *Aluminium.*—Imports last year, 77,000 cwt.; previous year, 42,000 cwt.—mostly in wrought circles.

(*b*) *Yellow Metal.*—Imports last year, 290,000 cwt.; previous year, 178,000 cwt. While the United Kingdom controlled the yellow metal market in India, Germany trebled her share of the business last year as compared with the previous year.

(*c*) *Wrought Copper.*—Imports last year, 22,000 cwt.; previous year, 137,000 cwt. The greater proportion of this business usually goes to the United Kingdom, but last year the United States came into the market and supplied over 25 per cent of India's requirements.

(*d*) *German and Nickel Silver.*—Imports last year, 12,000 cwt.; previous year, 7,000 cwt.

(*e*) *Bars and Channels* (iron and steel).—Imports last year, 192,000 tons; previous year, 136,000 tons. Belgium has ousted nearly all her competitors from this market and last year supplied some 70 per cent of India's requirements.

(*f*) *Girders and Bridgework* (iron and steel).—Imports last year, 66,000 tons; previous year, 58,000 tons. The United Kingdom and Belgium are now about equally sharing the whole of this business.

(*g*) *Bolts and Nuts.*—Imports last year, 6,500 tons; previous year, 4,200 tons. The United Kingdom supplied about a half of this total, the United States about 10 per cent, and Belgium and Germany the remainder.

(*h*) *Wire fencing (iron and steel).*—Imports last year, 1,900 tons; previous year, 657 tons. Statistics are not available as to the sources of supply. But North America enjoys a very good share of this business and two or three Canadian brands are getting well established on the market.

(*i*) *Hoops and Strips.*—Imports last year, 25,000 tons; and previous year, 18,000 tons, nearly all from the United Kingdom.

(*j*) *Nails and Rivets (not wire).*—Imports last year, 11,300 tons; previous year, 7,200 tons. The United Kingdom has about 40 per cent of this business, but Norway and Sweden came into the market last year and supplied an almost equal proportion of this trade. Belgium supplied only 1,100 tons and the United States 400 tons.

(*k*) *Cast Pipes and Fittings.*—Imports last year, 27,000 tons; previous year, 17,000 tons. The United Kingdom supplied 80 per cent of this business and the United States 10 per cent.

(*l*) *Galvanized Sheets and Plates.*—Imports last year, 122,000 tons; previous year, 88,000 tons. The United Kingdom supplied all this trade with the exception of 7,000 tons from the United States.

(*m*) *Wrought Tubes and Fittings.*—Imports last year, 31,000 tons; previous year, 41,000 tons. During the previous year the United States had 60 per cent of this business, which was reduced last year to 35 per cent, the United Kingdom taking 45 per cent and Germany the remainder.

(*n*) *Wire Nails.*—Imports last year, 13,000 tons; previous year, 7,000 tons. Germany and Belgium together supplied nearly 80 per cent of this trade last year. The United States was in the market for a while, however, and supplied 1,400 tons.

(o) *Zinc or Spelter.*—Imports last year, 95,000 cwt.; previous year, 90,000 cwt., nearly all from the United Kingdom.

Paints.—Imports last year, 297,000 cwt.; previous year, 264,000 cwt. There are several paint factories in India, but the country still imports the best quality paints from the United Kingdom. Small quantities of varnishes are imported from the United States and a few cheap paints from Japan.

Paper.—Imports last year, 278 lacs; previous year, 234 lacs. Last year India increased her purchases of nearly all classes of paper, particularly of printing paper and writing paper. Of the 386,000 cwt. of printing paper imported last year, Noway supplied 35 per cent, the United Kingdom 30 per cent, and Sweden and Germany the remainder. Practically no printing paper came from North America. Nearly all the writing paper imported is English, although American manufacturers are now doing a little in bond papers. Local mills manufacture a good proportion of India's requirements of packing paper and pasteboard.

Provisions.—Imports last year, 277 lacs; previous year, 270 lacs. The largest item under this head is that of farinaceous and patent foods, to the imported value of 70 lacs last year. Importations of condensed milk amounted to 44 lacs, canned fruits 9 lacs, canned fish 19 lacs, bacon and hams 16 lacs, biscuits 27 lacs, and cheese 12 lacs. The United Kingdom's share of the last year's provision trade increased to 50 per cent of the total, while the American trade declined slightly. The United States supplies the Indian market with canned fruits, patent cereal foods, and canned salmon. Two or three Canadian brands of the latter are now on the market. Nearly all the condensed milk imported into the Indian market is supplied from Europe. A large American house is trying to establish a well-known brand of American condensed milk, but they are experiencing great difficulty in gaining a foothold.

Railway Plant and Rolling Stock.—Imports last year, 11 crores; previous year, 19 crores. During 1920-21 exceptionally large amounts were expended by the railways in the rehabilitation of their plant and rolling stock, which had not been replenished during the war. Owing to this cause and the lower costs of railway supplies and iron and steel work the amounts spent by the railways during the past year were much less than those spent during the previous year. During the past year the Indian railroads spent the following sums abroad for equipment: railway carriages, 514 lacs; locomotives and tenders, 215 lacs; rails and fish plates, 122 lacs; iron or steel sleepers, 152 lacs; wooden sleepers, 25 lacs.

With the exception of a few lacs spent on sleepers from Australia and the Pacific Coast of North America, practically all the Indian railway orders sent abroad were given to firms in the United Kingdom. In the future it is probable that a larger amount of the moneys spent by the Indian railroads will remain in India owing to the arrangements made for manufacturing railway carriages and parts, iron rails, chairs and iron and cement sleepers in this country.

Rubber tires.—Number imported last year, 158,000; number imported previous year, 127,000. French tires now lead in the Indian market, with English and American tires a close second and third. Italian tires, which had done well in 1920 and 1921, now show a much diminished business. One of the best known makes of American tires in India has from last year been coming from a Canadian plant, and another large American tire concern, now entering the Indian market, will also ship its tires from its Canadian plant. A large French tire manufacturer has the Indian territory very well organized, and competing tires find it very difficult to make headway against this famous French make.

Tea Chests.—Imports last year, 63 lacs; previous year, 59 lacs—practically all from the United Kingdom.

Textiles.—The yardage of piece goods imported into India last year was greatly in excess of the importations of the previous year, particularly in grey unbleached goods. Although the yardage of white and coloured goods imported last year was in excess of that imported the previous year, it was somewhat below imports for 1920-21. The total importations of cotton goods into India during the past year amounted in value to 72 crores, as compared with 60 crores the previous year. With the exception of a very small percentage of cheap Japanese goods, practically all of this trade of course goes to the United Kingdom.

Vehicles.—Canada supplied a larger number of motor cars for the Indian market last year than did any other country. Out of the 4.323 motor cars imported into India last year, 1,822 were built in Canada, 1,410 in the United States, and 449 in the United Kingdom. These figures do not probably give Canada full credit in this trade, as a certain percentage of built-in-Canada cars entering India are always credited to the United States in the Indian Customs returns. The trend of the Indian motor car trade is undoubtedly toward the importation of the cheap light car as manufactured in Canada and the United States. Notwithstanding the fact that the number of motor cars imported last year showed an advance of approximately 50 per cent over the previous year, the total value of motor cars imported dropped from 173 lacs in 1921-22 to 138 lacs in 1922-23. A number of high-priced American and European cars imported during 1920-21 still remain unsold in Bombay and Calcutta. The high price of petrol, a 30 per cent duty, and the general tightness of money contribute largely to the present popularity of the low-priced Ford and Chevrolet. During the month of March, 1923, out of a total of 329 cars imported valued at 9 lacs, 156 cars valued at over 3 lacs were made in Canada.

RE-EXPORTS

Indian ports do a considerable volume of business in re-exports with neighbouring countries, such as Arabia, Persia, Turkey, Ceylon, East Africa, etc. Last year this trade was worth over 15 crores as compared with 14 crores in the previous year. Indian ports, both large and small, share in the re-export trade, but Bombay does the lion's share of this business.

GOOD MARKET IN INDIA FOR ASBESTOS ROOFING

Trade Commissioner H. A. Chisholm

Calcutta, May 10, 1923.—There is in India at present a considerable demand on the part of the railways and public works departments for asbestos roofing of good quality. Ordinary corrugated iron sheetings are inclined to perish quickly in this climate, and it is the experience of the railways that asbestos roofing is the only material upon which reliance can be placed, particularly for engine sheds.

While some Belgian and German sheeting has been entering India recently, the bulk of the supplies is from the United Kingdom. The Continental product has been found to be inferior in quality to British, and several recent shipments from the Continent suffered heavily in breakages. As a result the market at present would look at nothing but British-made roofing. While no official statistics are available regarding the quantities of asbestos roofing used in India, it is estimated that imports amount in value to about $200,000 per annum.

During the last two years from 80 to 90 per cent of this amount represented British goods, while Belgium and the United States divided about equally the remainder of the business.

Of course the market for asbestos roofing is now greatly restricted by its comparatively high original cost, and black iron is used in many structures for which the railways would prefer asbestos. The following c.i.f., crated and delivered, Calcutta prices were recently quoted by a manufacturing concern in England.

Corrugated Asbestos Cement Sheets:

6 ft. by 3 ft. by 3/16 in. at 2s. 3d. per square yard.
6 ft. by 3 ft. by 5/32 in. at 2s. 1d. per square yard.
3 ft. to 10 ft. by 30 in. by ½ in. at 5s. 5d. per square yard.

Asbestos Cement Flat Building Sheets:

4 ft. to 8 ft. by 4 ft. by 3/16 in. at 2s. 7d. per square yard.

Any sheeting made of asbestos cement or other asbestos compositions, which will not perish under the severe Indian sun and heavy rains, should be able to compete with the British brands at present in the market, providing that the sheets do not break in transit and that prices are competitive.

This office would like to hear from any Canadian manufacturers prepared to land good non-perishable sheeting in Calcutta at prices approximating those detailed above.

GROWTH OF INDUSTRIAL ORGANIZATIONS IN AUSTRALIA

C. HARTLETT, OFFICE OF THE TRADE COMMISSIONER

Melbourne, May 1, 1923.—Probably there is no part of the world, in proportion to its population, in which trade organizations have developed to such an extent under normal conditions as in Australia.

Recently published figures show that in 1922 there were 703,000 members of various trade unions out of a total population of approximately 5,500,000, or 12·8 per cent. As women and children form a large proportion of the population, the percentage of organized labour is very large in comparison with the total number of actual workers.

The growth of the industrial movement in Australia is illustrated by the following table:—

	Unions	Members
1901	198	68,218
1906	302	147,049
1914	712	523,271
1916	705	546,556
1918	767	681,755
1920	796	684,450
1922	796	703,009

With the growing power of organized labour, wages have advanced and hours have been reduced. In 1914 the average weekly wage of a male worker was £2 15s. 7d. ($13.55), and the average number of working hours per week was 48·87; whereas in 1922 the average weekly wage had increased to £4 14s. 6d. ($22.99) and the hours had been reduced to 46·22 per week. Women workers have been similarly affected. In 1914 their average wage was £1 7s. 5d. ($6.67), and working hours 49·11 per week, while in 1922 the wage was £2 8s. 8d. ($11.84) and the hours 45·69.

Irrespective of wages, very strong efforts are now being made to revert to the former 48 hours standard per week, and some unions have already accepted that basis, while others are strenuously contending against any increase in working hours from those ruling in recent years.

VACUUM PROCESS OF FOOD STORAGE

C. Hartlett, Office of the Trade Commissioner in Australia

Melbourne, May 1, 1923.—As a result of successful trial shipments of perishable food products to Hong Kong and other Eastern ports, a company to be known as the Vacuum Storage and Trading Company Ltd. is now in process of formation in Melbourne. The company will have ample capital to acquire from the inventor the rights of a process of air control and vacuum storage of perishable produce; to erect storage chambers for the handling of goods by the process; to manufacture portable vacuum containers for the carriage of perishable produce; and to carry on business as buyers and sellers of fruit and other produce.

In a description of the process, which has been successfully demonstrated in trial shipments and favourably reported upon by consulting engineers and others interested in the subject, it is stated that the produce is stored in its ordinary marketing condition, in cases, tins, bags or other containers. It is placed within the storage chamber, from which all air is extracted by means of special patented appliances operated by electric or petrol power. If it is desired to remove, say, ten cases from the chamber, the only operation necessary is to allow the air into the chamber, open the door and take the required number of cases out. During this operation, while the air is in contact with the stored articles, the produce goes through the natural process of deterioration as if it were stored in an ordinary building; but immediately the air is again extracted all deterioration ceases. It is stated that there is no limit to the time produce can be stored by this system.

Should the process be as successfully operated on a commercial scale as is anticipated, a more detailed report will be furnished for the information of Canadian producers interested in the preservation and exportation of food products.

LONDON CLAUSE CHARGES ON IMPORTED HAY

Mr. Harrison Watson, Canadian Trade Commissioner in London, writes under date June 1, 1923, that disputes occasionally arise between Canadian shippers and English buyers of hay as to who should pay what is known as the London Clause Charges in connection with c.i.f. contracts. In the case of hay, these amount to 1s. 3d. a ton, and appear to be incurred for facilities in ligterage at the docks after the goods have been taken from the steamer. As a result of inquiries, Mr. Watson has received the following communication from the Secretary of the British Hay Traders' Association: "After inquiry my Committee find that importers who buy forage c.i.f. usually admit liability for and pay these charges."

FINANCIAL CONDITIONS IN BRAZIL

Mr. E. L. McColl, Canadian Trade Commissioner in Rio de Janeiro, sends the following cable descriptive of financial conditions in Brazil:—

"National Treasury shows over $400,000 surplus for the first quarter of 1923; the largest in twenty-two years. Coffee sales are diminishing owing to the approaching end of last year's crop, and therefore there is a scarcity of desirable sorts. Owing to this there is a lack of bills which will keep exchange weak until the July crop creates fresh activities, when it is expected to rise."

THE BUILDING TRADE IN JAMAICA

F. L. Casserly, Office of the Canadian Trade Commissioner

Kingston, Jamaica, May 25, 1923.—Building in Jamaica came almost to a standstill during the period of inflation which lasted roughly from the middle of 1917 to the end of 1920. Prices during that time were abnormally high, and a cottage which could have been put up for a modest sum before the war cost a small fortune to build. The thickly populated areas of Jamaica, particularly Kingston and its environs, were faced with a shortage of dwellings, and rents soared to unprecedented levels. The slump, which hit the sugar planters and other agricultural producers so disastrously, has been a boon to prospective home-makers, the cost of building being now only about 50 per cent above the mean pre-war level. Thus there has been much building activity of late in Kingston and its suburbs, and many large properties are being sold and cut up into small lots. During the past six months there have been on an average 125 new buildings per month inspected by the municipal authority, in Kingston alone. No figures are available for the adjacent districts or for other parts of the island, but it is probable that this activity has been paralleled in the case of the former, where most of the better-off people who work in the city reside. Though many of the new buildings are shops, and still others are tiny cottages for the poor, quite a large propertion are middle-class houses, while a few are mansions. It should be noted that most of this construction is proceeding in a district with a population of only 85,000, the great majority of whom are compelled by poverty to endure a low standard of living; allowance must be made for this factor in any comparison with the building activity in northern areas of equal population. Thus there has been a marked increase in the demand for cement, lumber and almost every other type of building material, as well as for various household furnishings. The following notes on house construction will therefore be of interest to Canadian manufacturers:—

Type of Building.—The one-floor cottage or bungalow with two, three or four bedrooms and plenty of verandah space, is the type of house most in demand. Two-story houses are going out of fashion in Jamaica, and nowadays are built only by the well-to-do. The most popular form of construction is made up of concrete foundation; brick or concrete walls in wooden frame ("nog"); wooden roof, and sometimes metal shingles. Galvanized iron sheeting is used for shops and the houses of the poorer classes.

The homes of most poor people, and also of some few of the well-to-do classes, who cannot forget the 1907 earthquake, are built of wood throughout; but this form of construction, though earthquake-proof, is very hot in a tropical country, and the risk of fire is considerably greater than in the case of a brick or concrete building. Solid brick or concrete without any wooden frame is seldom met with to-day, on account of the high cost; the walls of such a house need to be at least twice as thick as when "nog" is employed.

Cement.—Canadian cement now sells at about the same price as English, and between them they cover most of the demand. The quantities of Danish, Dutch and German cement used are insignificant. Owing to energetic salesmanship, the Canadian product has risen to a position of prominence in this market which it did not possess eighteen months ago.

Lumber.—Supplies under this heading are entirely American, and come from the southern United States, pitch pine and white pine being the varieties used in house-building, the former for outside and the latter for inside work. Houses are invariably framed up in pitch pine, which, though fairly hard, is easily worked. These woods are unfortunately very vulnerable to attack by

ants, which if left to themselves will do considerable damage in the course of a few years. A well-known British creosote preparation has been in use for some years as a prophylactic, and good results are claimed for it. Its effect, however, though very lasting, is not absolutely permanent; and it seems certain that if an insect-resisting timber could be placed on the market at competitive prices, it would in a short time completely supplant pitch and white pine. Jamaica has fairly extensive supplies of tropical hard woods which are impervious to ant attack, and specimens of which are to be seen in a perfect state of preservation in buildings over a century old; but owing to the absence of a local lumbering industry, the inaccessibility of the forests and the high cost of inland transport, the cost of such lumber is prohibitive. Hence it is very exceptional for native woods to be used in house-building, except in rural districts, where small supplies of Jamaican cedar are available. There are some who believe that British Columbia Douglas fir would stand insect-ravages better than pitch or white pine. If this could be demonstrated, and if some means could be found of getting such timber to Jamaica so as to sell at competitive prices, excellent business could be done.

Shingles.—Cleft cypress shingles from the Southern States are the most popular; but shingles locally manufactured from native woods have a small though increasing demand, since they usually sell at a slightly lower figure than the imported article. At present, the local industry can take care of only a small fraction of the demand, but it is helped by the customs tariff, which imposes a duty of 4s. 6d. per 1,000 preferential, and 6s. general on imported shingles.

Doors, Sashes and Interior Trim.—These are mostly imported ready-made in standard sizes from the southern United States, but a certain number are manufactured by local saw mills from American pine, and also from Jamaican woods. The same applies to mouldings, cornices, architraves and other kinds of interior trim.

Plasters.—A cheap lime plaster of local preparation is in almost universal use in Jamaica, and makes quite a good finish if properly mixed and laid on. All the ingredients are obtained in the island; hence, on account of its low cost, this form of plaster defies the competition of any imported article such as gypsum. After the plaster has been laid on and allowed to dry, walls are usually painted or distempered; inside walls, however, are sometimes papered.

Paints and Varnishes.—Most of these supplies come from England, though of late American paints have been much in evidence. Ready-mixed paints are not much used. On account of their cheapness, distempers are popular. Varnishes are employed to a limited extent for interior work. A small demand has recently developed for floor paints; this gives promise of increase in view of the growing tendency of householders to abandon the traditional method of polishing floors on hands and knees with a coconut brush. Servants are becoming more and more averse to this laborious work, which really seems a waste of energy.

Wire Nails, Screws, Locks, etc.—These supplies are mainly English and American; however, Canadian goods have lately been coming in, owing to energetic salesmanship.

Sanitary Fittings.—Great Britain and the United States divide this trade, which has shown considerable expansion in recent years, with the growth of modern ideas on sanitation and comfort. It is only the houses of the very poor, situated beyond the range of Kingston's sewerage system, which still possess that ancient malodorous abomination the pitcloset. Water closets are

in general use wherever the owners can afford them; not many of the houses noted at the beginning of this report are without this convenience. Also there is a growing demand for fixed lavatory basins with running water for bedrooms, to supplant the old-fashioned toilet set. Enamelled and galvanized sinks for kitchen and pantry are much in request; in all these articles the business is divided between Great Britain and the United States. The writer has never seen Canadian goods of this nature in any of the retail establishments in Kingston. Water closets cost, to the retail purchaser, from £7 to £15 each; lavatory basins from £4 upwards; galvanized sinks about £1 5s., and enamelled sinks about £4.

Kitchen Furnishings.—Houses in this country are often delivered by the builder with kitchen stove installed. The most popular stove on the market is a well-known Scottish make which burns wood and is foolproof. A similar Canadian article, however, has lately been coming in. There is a growing demand for oil stoves, which give no smoke, are infinitely cleaner, and obviate the use of wood fuel which, besides being expensive, is a nuisance to most householders, owing to the chopping which has to be done. During the past year or so an American stove of this type has been introduced, and has done well despite its high cost; there are likewise a few makes of British oil-stoves on the market. Gas is available for cooking only in Kingston, but is very little used for this purpose. There are no electrical stoves in use, electricity here being many times as costly as in England or the United States.

MARKET FOR RUBBER PRODUCTS IN JAMAICA

F. L. CASSERLY, CANADIAN TRADE COMMISSIONER'S OFFICE

Kingston, Jamaica, May 25, 1923.—In the Jamaican Customs returns, rubber products are included under three principal headings—motor car parts, manufactures of India-rubber, bicycles and parts.

Motor Car Parts.—The total value of the imports during 1922 was £68,854, of which the United Kingdom was credited with £1,089, the United States with £55,814, and Canada with £11,843. In addition to tires and tubes for cars and trucks, these returns include all kinds of metal fittings for such machines, but no differentiation is made. It is probable, however, that tires and tubes account for four-fifths of the above imports.

India-Rubber, Manufactures of.—The imports of goods of this description during 1922 were valued at £7,622, of which the United Kingdom was credited with £766, the United States with £3,265, and Canada with £3,539. With the exception of the goods specified in the preceding and succeeding sections, everything made from rubber, such as belting, surgical and sanitary goods and toys, is covered by this category. Rubber heels and soles, however, whether separate or forming part of boots and shoes, and also rubber mackintoshes, are not included. The former fall under the generic heading of footwear, the figures for which are not given since, embracing every kind of boot and shoe, they would be valueless for the present purpose. The same applies to mackintoshes, which are grouped under apparel by the Customs.

Bicycles and Parts thereof.—The import figures for 1922 are as follows:—

	Bicycles	Parts
From United Kingdom	£2,312	£1,517
United States	478	234
Canada	nil	nil
Other countries	123	67
Total	£2,913	£1,818

These imports cover tires and tubes for ordinary and motor bicycles, in addition to metal accessories, and of course complete machines; but no differentiation is made by the Customs. The rubber importations, however, under this head, are very limited.

All the above figures represent f.o.b. values; c.i.f. prices are not available.

NOTES ON ABOVE IMPORTS

Motor Car Tires.—Some of the chief makes on the market are Goodyear and Gutta Percha (Canadian); Goodrich, Ajax, and Firestone (American). The most popular sizes are (in inches): 30 by 3½; 30 by 3; 32 by 4; 33 by 4; 34 by 4; 33 by 4½. There are likewise several other brands which, although perhaps not so widely known, nevertheless secure between them a considerable share of the business. Cord tires are more popular than fabric, though the latter are still sold to a certain extent. Such sales, however, are declining, since manufacturers abroad appear to prefer supplying the cord variety. Practically no motor car tires are imported from England.

At present there are over 3,000 motor-cars in Jamaica, and this number promises to increase. The demand for tires is brisk, and competition very keen. Although the greater portion of the business is American, Canada obtains a good share of it.

Motor Truck Tires.—There is likewise a large and increasing demand for these. The motor truck is steadily gaining in popularity as a transport medium, and by reason of its superior speed, cheapness, and ability to touch almost any point, now commands much of the freight which used to be carried by rail. Both solid and pneumatic tires are used, 36 by 6 and 38 by 7 inches being favourite sizes, and the chief makes are the same as those mentioned in the preceding section, except that one or two of the manufacturers export pneumatics only. There are small tire sales of English motor trucks, which are generally equipped with Dunlop, Michelin, or some other make of British tire. Outside of these, however, the business goes to the United States and Canada.

The pneumatic tire is already popular amongst truck users, and will probably become more so in consequence of the recent law to regulate motor traffic passed by the Jamaica Legislature. One of the objects aimed at by this measure is the protection of the roads, which of late years have suffered considerably from the increased use of trucks. Henceforth, such vehicles will be taxed on basis of weight as well as kind of tire, and direct encouragement is given to the use of pneumatics, which do the least damage, by the imposition of a lighter tax.

Bicycle Tires (Motor and Ordinary).—The demand for these is limited as the number in use is not large. The tires in popular use are principally English and American, which are supplied by the makers with the machines, replacements being furnished through local agents.

Tubes.—There is a good and steady demand for inner tubes for motor-car and truck tires; as a rule, such tubes are made by all the large tire manufacturers and are handled by their agents in conjunction with the tires. Both red and grey tubes are in use. No particular preference is noted, but the red tubes are said to be made of slightly more refined rubber. Tubes for motor and ordinary bicycles have limited sales; such imports are divided mainly between Great Britain and the United States.

Rubber Footwear.—Canvas shoes with rubber heels and soles, and heels and soles separately, are the products which come under this heading. No statistics are available, as such goods are included under the general heading

of Footwear. Many thousands of pairs of rubber heels and soles are sold in Jamaica every year, and two well-known Canadian lines have a large share of this trade; the American product is also much in evidence. The shoes are made in tennis and gymnasium styles, as well as for ordinary wear; this trade is mainly American, especially in the cheaper varieties. Smaller quantities of higher grade shoes are brought in from England and Canada. All these articles are handled by retailers who sometimes buy through local manufacturers' representatives, but oftener through their purchasing connections abroad. There is practically no demand in Jamaica for goloshes, gum-boots or fishermen's boots.

Mackintoshes.—The demand for these is confined to the upper and middle classes—a small minority. Jamaica has a dry climate; hence raincoats are usd only occasionally.

Garden Hose.—Fair quantities are sold, especially in Kingston and the suburbs, where most of the better-class houses have gardens, each requiring a length of hose for watering. The popular size is ½ inch in diameter (inside) to fit the ordinary water pipe, but smaller quantities of ¾-inch hose are likewise sold. This product is made by many of the tire companies doing business in Jamaica, and distributed through their local agents. Some retailers, however, obtain their supplies direct from manufacturers. This business is shared between the United States and Canada; English quotations are said to be too high.

Rubber Belting.—Jamaica being almost entirely agricultural, and machinery not much in use, the demand for belting is small. Nevertheless, there is a limited market in sugar mills, foundries and machine shops. As in the case of garden hose, some of the large tire manufacturers also supply rubber belting.

Sundries.—Under this heading are comprised surgical and sanitary requisites, and toys; but the value of the imports is not large. England, the United States, and Canada are the principal sources of supply, the United States being perhaps the largest contributor. Purchases are frequently obtained by individual users by parcels post. Hot-water bottles and similar articles can be sold to a limited extent, and there is likewise a fair demand for babies' soothers. Gramophone records have a limited sale, and are imported almost entirely from the United States. The toy balloon is much in demand at Christmas time, when thousands are sold all over Jamaica. A toy locally known as the " fee-fee," made from a bag of thin, highly coloured rubber fabric joined to a whistle, which emits a strident noise when the bag is inflated, is also popular during that festive season. These goods are largely of German and Japanese manufacture.

UNITED STATES OCEAN CHARTER MARKET DEPRESSED

Mr. Frederick H. Palmer, Assistant Trade Commissioner in the United States, writes under date of June 7 that the *Boston News Bureau* has issued the following report: Conditions in the ocean charter market show no improvement. Extreme dullness prevails, owing to scarcity of full cargo offerings in practically all overseas trade. With the exception of a slightly steadier tone in coal tonnage for loading this month rates continue decidedly weak, in some cases wholly nominal, and are so low that owners of some steamers have decided to lay up their vessels on this side until the situation changes for the better. Others in a distressed position are accepting any business they can get, even at unprofitable rates, to avoid further delay in sailing. Tonnage for all transatlantic trades is in abundant supply, greatly exceeding the demand, and freely offered for charter.

TRADE OF THE UNITED STATES

Frederick H. Palmer, Assistant Trade Commissioner in the United States

New York City, May 30, 1923.—Recently issued summaries of trade from the United States Commerce Department report record-breaking imports, and as a result, in March, for the first time since August, 1914, the balance of foreign trade turned against the United States.

During March, merchandise valued at \$398,075,083 was imported, while the exports during the month were valued at \$341,162,349. This places the balance of trade at \$56,912,734, the first surplus of imports over exports since 1914. Not only does the value of the exports stand out in striking contrast with the striking exports of \$454,000,000 during December, 1920, or with the \$635,000,000 exports of June, 1919, but the excess of imports is the largest ever recorded in the foreign trade of the United States.

It is not possible to give a detailed statement of the imports or exports affecting this adverse trade balance, since statistics of the foreign trade for March have not yet been issued. The summary of January's foreign commerce was only received on May 21, and an examination of these detailed statistics reveal the following fluctuations in the foreign trade of the United States. During January of 1923 the total trade was valued at \$665,441,971 as compared with \$496,033,865 in January, 1922, but the surplus of exports decreased from \$61,666,073 to \$5,636,413. In the months under review the exports increased in value from \$278,848,469 to \$335,539,192 or 20 per cent, and the imports increased from \$217,185,396 to \$329,902,779 or 52 per cent.

INCREASE IN UNITED STATES FOOTWEAR PRODUCTION

St. John Betts, Office of the Trade Commissioner in the Uhited States

New York City, June 7, 1923.—According to the Bureau of Foreign and Domestic Commerce in the United States, there was an increase in the production of footwear, other than rubber, of 20·6 per cent during the first quarter of 1923 compared with the corresponding period for 1922. The largest increase was in men's shoes, approximately 5,000,000 pairs. The increase in women's shoes was nearly 3,000,000 pairs, and in infants' 2,000,000.

The production during March, 1923, exceeds that of March, 1922, by nearly 5,000,000 pairs, the total being 34,355,833 pairs, of which 9,528,957 pairs were men's; 2,085,449 boys' and youths'; 11,037,295 women's; 4,040,954 misses' and children's; 2,679,128 infants'; 812,833 athletic and sporting (leather); 1,147,286 canvas and other textile fabrics; " all other," 3,023,931.

There was an increase of 42·1 per cent in volume and 36·9 per cent in value in the United States export trade in leather boots, shoes and slippers during the first quarter of 1923 as compared with the same period in 1922. Official statistics show that in March, 1923, there was an increase of 35·5 per cent in exports over the corresponding month in 1922, the total number of pairs of leather boots and shoes exported having been 616,427.

The most noticeable increase in the export trade in footwear by countries is that with Cuba, which imported in March, 1923, 142,968 pairs of men's, 44,914 of women's, and 133,394 of children's boots and shoes, as compared with only 31,784 pairs of men's, 35,822 pairs of women's, and 58,965 pairs of children's in March, 1922.

THE CUBAN MARKET FOR CERTAIN CANADIAN PRODUCTS

J. L. GONZALEZ-HOYUELA, OFFICE OF THE CANADIAN TRADE COMMISSIONER

Havana, May 31, 1923.—*Potatoes.*—The market for this commodity has shown a weaker tendency. Local importers are selling at from $4.75 to $5 per sack of 180 pounds, duty paid and delivered. The market is falling and the expectations are for a weaker market in the near future, due to the recent heavy arrivals. Virginia has opened her new crop for shipment at from $6 to $6.25 per barrel c.i.f. Havana.

Potato arrivals from Europe have been discontinued and there will be no more shipments in future on account of the Presidential Decree which has just been enacted by the Cuban Government (see the last issue of the *Commercial Intelligence Journal*, page 958), which absolutely prohibits the importation into Cuba of potatoes from Newfoundland, St. Pierre and Miquelon Islands, Great Britain (including England, Scotland, Wales, Ireland), Belgium, Germany, Austria-Hungary, and Mexico, on account of the existence (so reads the decree) of the disease known as "potato wart."

The said decree expressly authorizes the importation of potatoes from Canada, Bermuda, and Canary Islands, provided that every shipment is accompanied by a health certificate issued by an agricultural authority (Canadian, in the case of Canada) and visé by the Cuban consul or any other consular authority (so the decree reads). This certificate shall set forth that the potatoes are exempt from sickness and plague. Another article of the decree provides that all shipments shall be duly inspected on arrival in Cuba before admission by the Custom House.

Codfish.—The local market for this commodity is also weak and the demand very poor. Sales are being made at $8 per case of Halifax codfish, duty paid and delivered, which prices figures out at about $7.25 c.i.f. At this price were made all the late purchases, which aggregate about 10,000 packages. Norwegian codfish is quoted at from $9 to $9.25 c.i.f., although the local Havana trade is selling at this same price, delivered. The market prospects for the time being are very poor.

Hay.—Prospects for purchasing of hay from Canada for the Cuban market are, for the time being, stopped on account of no further direct sailings from St. John until the coming potato season, which will start during next September and October. All late sales were made on the basis of $25 per ton c.i.f. Havana.

Wheat Flour.—There is a large local stock of this commodity and sales are therefore being made at less than the actual cost of bringing it down from Canada. Quotations of American flour are a little over Canadian quotations for a similar grade, there being a difference of some 50 to 60 cents. There continue to arrive some shipments from Canada, but there is at present a very keen competition among local flour importers.

NEW DANISH BELTING ADVANTAGEOUS FOR OUTDOOR USE

A new belting recently invented in Denmark is said to possess many advantages over the ordinary belting now used, says the United States *Commerce Reports*. It is manufactured from flax instead of cotton and is impregnated with certain chemicals which make it especially resistive to water, acids, etc., thus permitting its use outdoors in all kinds of weather.

ITALIAN COD FISHERY DEVELOPMENT

Assistant Trade Commissioner A. F. MacEachern

Milan, May 18, 1923.—An Italian company, headed by the Prince of Udine and capitalized at eight million lire, has been organized for the purpose of prosecuting the cod fishery in the North Sea and in Icelandic waters, and has been endorsed by the Italian Government. At the outset the Government proposes to secure from Germany, in lieu of reparation payments, a fleet of fishing craft, especially equipped with cold-storage facilties, which will be turned over to the new company. The total value of these craft is estimated at some six million gold marks, and it has been arranged that the company will reimburse the Government for this outlay in thirty annual payments, in paper currency.

This Italian fleet will have its operating base at a German port (not definitely decided upon as yet, but understood to be Emden) in the North Sea, and will bring all catches to this base, where they will be transhipped to refrigerator-equipped cargo steamers and despatched to Italy. An agreement has already been entered into with a German company, experienced in North Sea fishery, under which the Italian venture will be given the benefit of this company's experience. The present depreciation of the mark has been an important factor in determining the choice of a German operating base.

It is estimated by those actively interested in the project that some 7,200 tons of codfish will be brought into Italy by the company during the first operating season (the summer and autumn of this year), which would approximate one-fourth of the total importation of codfish and stock fish during the year 1922. Thereafter it is the intention to expand operations, and interested parties confidently predict that a profit of millions of lire annually is possible. At the same time the fish will be disposed of at as low a price as 2.70 lire per kilo., whereas the average price paid for imported cod and stock fish is about 6 lire per kilo. Imported fish have to pay customs duties, while the catches of the new Italian company will be entered free of duty.

A prominent Rome newspaper, *Il Giornale D'Italia*, has devoted a long article to this project, which may be summarized as follows:—

The problem of the fisheries and fish supplies has hitherto been neglected in Italy and left in the hands of fishermen who were inadequately equipped. Pre-war statistics of the sea fisheries of some of the principal countries reveal the following figures:—

	Number of Fishermen.	Production in Million Lire.
England	106,000	250
France	115,000	130
Norway	101,000	80
Spain	120,000	40
Italy	110,000	28
Holland	24,000	25

From the above it will be seen that England and France rank first and second respectively in the sea fishery. With reference to Italy, the above statement showing a production of 28 million lire may not be taken as accurate, because in the district of Venice alone there appears to be a market for about 70,000 quintals of fish, valued at some 40 million lire. While the local catch is considerable, it is not at all in keeping with the expanse of fishing grounds available to Italy. The people ought to eat less meat, which is very expensive, and more fish instead, but to enable them to do so fish should be sold at a lower price than that prevailing at present.

In 1861 Italy sent men to Newfoundland for the purpose of studying methods of fishing cod, with the view of fostering this industry in Italy, but no tangible results were achieved for the reason that those charged with the mission were inadequately supplied financially, and were insufficiently equipped with technical information to carry so great and difficult a problem to a successful conclusion.

Several enterprises were instituted and laws enacted which were calculated to make for the expansion of the industry from time to time; but still, insufficient assistance has been given by the Government. France instituted a policy of extending practical help to her fishermen when she expended some 200 million lire on her shipping, ports and cold-storage plants, and, following the example of France, the Italian Government in 1920 offered substantial prizes for the best fishing boats and cold-storage plants throughout the country.

Because of the fact that profits from the Italian fisheries, as at present conducted, are so limited, owing to lack of adequate organization, importation of cod and fish of all kinds, including fresh, salted, and smoked fish, continues to grow in importance, and greatly exceeds local production, as is shown by the following figures:—

	Tons.	Million Lire.
1913	74,000	64
1918	55.000	193
January-September, 1922	45.000	238

From 1913 to 1918 diminished importation was accounted for owing to difficulty in securing supplies during war years, but the value increased rapidly. During the first nine months of 1922 some 45,000 tons, valued at 238 million lire, were imported, which would correspond to an importation of some 60,000 tons, valued at 315 million lire, for the whole year.

The principal products of the fisheries imported during the nine months, January-September, 1922, were:—

	Tons.	Million Lire.
Codfish	15,500	61
Stockfish	6,800	31
Herrings (dried)	2,260	?
Sardines and pilchards, in brine	7,580	36
Tinned sardines and anchovies	3,305	27
Tunny, in tins	3,278	55

Codfish and stockfish rank first and second respectively, for the reason that the poor—and in fact the greater part of the population—demand that kind of fish, which is found in great quantities in Newfoundland waters, where the French and Newfoundlers catch it, and in Icelandic waters, where Italians should prosecute the fisheries.

The catches off Newfoundland are obtained by large and well-organized concerns, adequately capitalized for the carrying on of this great industry, which explains why this fish, coming to Italy from such a distance, costs much less than fish caught locally in smaller quantities. Imported codfish is obtainable in Italy as low as 5 lire per kilo., while an inferior quality of fish, caught locally, costs double that figure. Dried codfish has much flesh on it and no water, whereas fish caught locally contains much water.

TENDENCIES IN HUNGARIAN COTTON GOODS MARKETS

Czecho Slovakia has surrendered to Austria its place as leader in the Hungarian cotton goods markets. Other countries with high exchange, including Italy and Switzerland also have lost ground, whereas Germany and Austria are gaining, says the *United States Commerce Reports.*

ECONOMIC CONDITIONS IN HOLLAND

Trade Commissioner Norman D. Johnston

Rotterdam, May 28, 1923.—The comparative stability of the German mark for a time caused a more optimistic view to be taken in industrial circles of the economic situation in Holland, but the new fall of the German exchange tended to revive the fears. There is, however, a general feeling that if this currency does further depreciate German competition, which the Ruhr occupation has rendered so much more difficult, is not likely to become acute in Holland, as was previously the case. As an example of this, German firms recently submitted tenders for the superstructural work for a bridge over the North Holland canal ranging from 101,500 fl. to 110,000 fl., while all the Dutch offers were less than 100,000 fl., and an Amsterdam firm got the order at 72,900 fl. In other words, there was a difference of about 40 per cent between the lowest Dutch and the highest German tenders. From various sources one hears that business is showing slight improvement in certain lines, particularly in the larger concerns. Shipping, especially in the port of Rotterdam, continues to feel adversely the effect of the Ruhr occupation.

Both Dutch imports and exports showed an increase in April over last year, and for the four months January to April the imports into Holland amounted to 670,389,568 fl. in 1923 as compared with 652,629,727 fl. in 1922, and exports to 390,072,436 fl. this year as against 375,920,411 fl. during the four months of last year.

The Government revenues from January to March, 1923, were 106,897,982 fl., which is 6,713,816 fl. over the same period of 1922. The municipalities have been cutting down expenditures; in Amsterdam, for instance, which contains about 10 per cent of the population of Holland, the reductions in income tax during the last three years have been in the proportion of 100:90:75, while there is a prospect of further reduction to 67·5 for 1924. There is room, however, for reduction, for taking the municipal income taxes in 1914 as being equal to 100, the taxes in 1922 in Amsterdam stood at 398, in Rotterdam at 470, in The Hague at 412, and in Utrecht at 302. The debts of the thirty-four largest municipalities rose in the period 1914-22 from 406 to 824 million guilders or by 104½ per cent. This cannot be considered as exceptionally high under the circumstances, especially as most of the new loans were contracted for productive purposes.

A first attempt made by the Dutch Government with the small amount of 10 million guilders 4½ per cent four years treasury bills was so successful that only 6 per cent of the applications could be allotted. A second attempt to issue 25 million guilders 4½ per cent six years treasury notes was also very successful.

The difficult times through which Holland has passed are indicated in the number of bankruptcies, the figures from January 1 to May 4 being 1,430 as against 932 during the corresponding period last year.

STANDARDIZATION OF RUSSIAN EXPORTS

The *Ost Express* of Moscow states that the obligatory standardization of Russian exports, which was planned by the Soviet Government, has now become law. The object of the new law is to improve the quality of these goods, which at present is variable. All goods for export must bear their standard mark, the indication of quantity, and the name of the exporting organization or firm. The terms of the new law will be drawn up by the Foreign Trade Commissariat. Persons exporting goods which do not correspond to the legal standard will be refused further export licenses.

TARIFF CHANGES AND CUSTOMS REGULATIONS

Conditions Governing Free Entry of United States Goods Returned

The provision in the United States Tariff Act of 1922 (Item 1514) for free entry of "American goods returned" reads in part: "Articles the growth, produce, or manufacture of the United States, when returned after having been exported, without having been advanced in value or improved in condition by any process of manufacture or other means *if imported by or for the account of the person who exported them from the United States.*" All the words quoted except those in italics were in the corresponding provision of the 1913 Tariff Act (Item 404).

Importation of Samples of Merchandise into Mexico

Trade Commissioner C. Noel Wilde

Mexico City, May 30, 1923.—In view of the number of firms which are forwarding samples of merchandise to the Trade Commissioner's office in Mexico, it appears desirable to draw the attention of Canadian exporters to the regulations of the Mexican Customs Department which govern this matter.

Fraction No. 699 of the Customs Tariff of Mexico reads as follows: "Samples of paper, cloth and other goods, unserviceable, which by reason of their condition cannot be sold.—Free."

At first sight, this would appear to indicate that unsalable samples of any kind are admitted into the country free of duty; in practice, however, this is not the case. The fraction refers particularly to samples which are useless for the purpose of sale, whose only object is to permit the commercial valuation of the merchandise, and which arrive in such a condition that they can be neither used nor sold. For example, it would include articles of cloth in the form of cuttings, but such cuttings must not exceed 20 centimetres in length, or such dimensions as may be indispensable to give an idea of the character of the material which it represents. An ordinary handkerchief would not be considered a sample for the purpose of customs valuation, but one-half of a handkerchief would be accepted as such. A piece of wall paper not exceeding a metre in length is considered as a sample, but longer pieces would pay the duty applicable to wall papers. A single boot, undamaged, would appear to be quite useless for sale purposes, but experience proves that this is not considered as a sample, although, if the leather were perforated or damaged so that the boot could not be used, it might be so admitted. Simple perforation or cutting, however, is not generally considered sufficient, as although this may depreciate the value of the merchandise, it does not render it useless.

Thus, whole samples, and samples which by themselves are capable of being used in any way whatsoever, do not come under the fraction of the tariff above referred to but must pay the full duty imposed by the customs tariff on the articles themselves. Further, the consignee is not permitted to render the samples useless after their arrival in the custom house; he must either pay the duty imposed or abandon them.

An additional regulation states that when a sample case contains various classes of merchandise which have not been rendered useless, and which come under different customs classification but are presented for clearance without being properly separated, duty will be imposed at that rate which is applicable to the class of goods bearing the highest tariff.

Exporters must therefore expect full duties to be charged on all samples forwarded to their agents unless special precautions have been taken to render them unserviceable for any purpose whatever, and if no arrangements have been made to the contrary, it is customary for the exporter to refund the amount of such duties.

SHIPPING DOCUMENTS

When samples are forwarded by freight, the usual shipping documents are necessary for clearing them from the customs on arrival, no distinction being made between samples and ordinary merchandise. If, however, they are forwarded by parcel post (which is the usual method with samples small enough to travel by this means), special regulations apply; these regulations are given below.

ADVERTISING MATTER

It should be borne in mind that advertising matter bears a duty of $2.50 per kilo, Mexican currency, equal to 57 cents per pound, Canadian currency, and this duty is considered as being chargeable upon any printed matter which can be classed as advertising. In practice, however, it is found that small catalogues or pamphlets, mailed in envelopes of reasonable size, are usually delivered by letter post without any duty being imposed; larger catalogues or price lists are liable to duty, and advertising matter, arriving by parcel post or freight, is invariably subject to the full duty.

Tariff Changes in Mexico

Mr. C. Noel Wilde, Canadian Trade Commissioner in Mexico, writes under date May 23, 1923, that the following changes and additions have recently been made in the Customs Tariff of Mexico:

Number		Mexican Currency =	Canadian Currency per lb.
633-a	Bodies and wheel sets, front or rear, and individual parts thereof, for automobiles of all kinds.. .. ..ad valorem	20%	....
633-d	Motors for automobiles, repair parts for same, and all parts which form a portion of the propelling mechanism.. .. ..ad valorem	20%	....
639	Side arms of all kinds, and loose blades for same, per kilo legal..	$ 7 50	$1.705
640	Firearms, repeating or breach loading, of all kinds, and repair parts thereof, also machines for loading cartridges by hand, per kilo legal..	15 00	3.41
641	Ditto, other than repeating or breech loading, per kilo legal..	5 00	1.136
642	Cartridges, loaded or unloaded, and percussion caps for firearms, per kilo gross..	3 75	.852
642-a	Cartridges, loaded or unloaded, for shot guns, per kilo gross..	1 50	.34
642-b	Shot guns, other than repeating or breech loading, and repair parts thereof, per kilo legal..	2 00	.455
347-a	Handkerchiefs of cotton fabric, neither cut nor hemmed (will bear the duty corresponding to the material of which they are made).	....	....
347-b	Handkerchiefs of cotton fabric, cut or hemmed (will bear the duty corresponding to the material of which they are made, plus 25%).	....	....
400-a	Handkerchiefs of linen fabric, neither cut nor hemmed (will bear the duty corresponding to the material of which they are made).	....	....
400-b	Handkerchiefs of linen fabric, cut or hemmed (will bear the duty corresponding to the material of which they are made, plus 25%).	....	....

Previous changes in the Mexican Tariff were published in *Commercial Intelligence Journal* No. 1006, May 12, 1923.

Parcel Post Shipments to Mexico

Mr. C. Noel Wilde, Canadian Trade Commissioner in Mexico, writes under date May 23, 1923, with reference to parcel post shipments to Mexico, that regulations have now been issued in regard to the provision of certified invoices as follows:

(1) A foreign shipper making use of the postal service in sending goods to Mexico must present a copy of the corresponding commercial invoice to the nearest Mexican Consulate for certification. After being certified, such invoice must be forwarded to the addressee of the goods, who must in turn present it

to the Custom House, the Customs Department of the Post Office, or other office authorized to deliver postal packages at the point to which the goods are addressed.

(2) The office authorized to deliver postal packages must demand the corresponding certified commercial invoice from the person who makes a request for the goods.

(3) If the certified commercial invoice cannot be shown, the office of delivery shall make an estimate of the value of the goods, in order to calculate the amount of the charges on same, and shall also impose an additional charge according to the following scale:

(a) If the commercial value of the merchandise is more than ten pesos and less than one hundred pesos	25 cvos.
(b) One hundred pesos and upwards	50 cvos.

(4) If the commercial invoice can be shown, but such invoice is not certified, the office of delivery shall also collect an additional charge in accordance with the tariff mentioned above.

(5) If objection is raised to the estimate of value made by the delivery office, the latter shall so state on the receipt handed to the consignee, and shall advise the Director General of Customs to that effect.

PARCEL POST VIA NEW YORK TO CENTRAL AND SOUTH AMERICA

Canadian manufacturers and exporters are advised that parcels may be accepted for transmission via New York to countries in Central and South America. This route is in addition to the existing parcel post route via England and the direct route to British Honduras, Colombia, and Venezuela and is optional with the sender in each case. The rate of postage for parcels forwarded by the New York route is 18 cents for each pound or fraction thereof. The limit of weight is 11 pounds. The regulations as to packing, customs declarations, prohibited articles, etc., are the same as those which have hitherto applied to parcels despatched via England or direct Canadian route.

Parcels for Central and South America intended for transmission via New York should be largely marked "Via New York" and forwarded to Montreal to be included in parcel mails which will be made up by that office for New York.

DEMAND FOR PLUMBING MATERIALS IN TIENTSIN, CHINA

A brisk demand exists for plumbing materials in Tientsin, China, where a considerable number of modern buildings and warehouses are under construction, which will be equipped with water and steam heating apparatus, says the London *Times Trade Supplement*. Plumbing supplies are also required by railways, electric lighting companies, mines, and factories. Goods in demand are pipes and tubes, sanitary ware, heating devices, and materials for plumbing work generally. There is a market for small tools and hack-saw blades.

THE CREDIT SYSTEM IN JAMAICA

The Jamaica Chamber of Commerce has just discussed the credit system as it affects large importers in their relation with traders in the island. Bankruptcies and the transferring of business places to other parties have been causing a good deal of concern in the colony. The Council of the Chamber has been empowered to investigate the credit system which obtains in Jamaica and the possibility of establishing a credit register; to consider the methods adopted in the transference of businesses in the island; to make recommendations for submission to the Government as to the lines on which legislation should be enacted, should such a step be necessary.

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain.	†*Berengaria*	New York	June 26
" " "	†*Paris*	New York	June 27
" " "	*Montcalm*	Montreal	June 29
" " "	‡*Empress of Britain*	Quebec	June 30
" " "	**Canada*	Montreal	June 30
" " "	:*Minnedosa*	Montreal	July 3
" " "	†*Leviathan*	New York	July 4
" " "	*Montrose*	Montreal	July 6
" " "	*Empress of Scotland*	Quebec	July 7
" " "	*Regina*	Montreal	July 7
Ireland only	‡*Marloch*	Montreal	June 28
"	‡*Metagama*	Montreal	July 5
France	**Antonia*	Montreal	July 7
Union of South Africa	**Cochrane*	Montreal	July 15
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela	*Chaudiere*	Halifax	July 6
St. Kitts, Antigua, Barbados, Trinidad, Br. Guiana	* *Canadian Squatter*	Montreal	June 27
Bermuda, Bahamas, Jamaica, Colombia, British Honduras	**Can. Fisher*	Montreal	July 5
China and Japan	*Empress of Canada*	Vancouver	June 28
" "	*President McKinley*	Victoria	July 1
Australia only	‡*Sonoma*	San Francisco	June 26
Australia and New Zealand	*Makura*	Vancouver	June 29

† Letter mail only. * Parcel Post and specially addressed correspondence only.

‡ Letter and paper mail only.

: The *Empress of Britain* and *Minnedosa* will also be used for direct mail for the Continent including direct Parcel Post to France.

"OPEN CONTRACTS"

The practice frequently adopted by large public bodies of inviting tenders in the form of "open contracts" is the subject of much criticism among British manufacturers at present, says the London *Times Trade Supplement*. This form of contract is used to cover the purchase of certain classes of goods at fixed prices, the buyers, however, reserving the right to accept only such quantities of the goods as they may from time to time order during the period of the contract. It is considered by contractors that the clause imposes a hardship on them, because they are bound as regards price, but are often left in the dark as to the amount of goods they may be called upon to supply. The purchasers, on the other hand, secure freedom either to take advantage of the contract or to place their orders elsewhere should prices fall. The Contracts Committee of the Federation of British Industries is requesting the various trade associations affiliated to that body to supply information as to whether the particular grievance is experienced in their respective industries, and whether in such event their members would be sufficiently of one mind in the matter to enable the association to co-operate with the federation in representations to purchasers who introduce this condition into their contracts.

61606—3

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING JUNE 12, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement of the nominal closing quotations for all the principal exchanges for the week ending June 12, 1923. Those for the week ending June 5 are also given for the sake of comparison.

		Parity	Week ending June 5, 1923	Week ending June 12 1923
Britain.. .. ..£	1.00	$4.86	$4.7251	$4.7247
France.. .. ..Fr.	1.	.193	.0663	.0657
Italy.. .. ..Lire.	1.	.193	.0478	.0476
Holland.. .. ..Florin.	1.	.402	.4005	.4014
Belgium.. .. ..Fr.	1.	.193	.0572	.0567
Spain.. .. ..Pes.	1.	.193	.1550	.1537
Portugal.. .. ..Esc.	1.	1.08	.0485	.0486
Switzerland.. .. ..Fr.	1.	.193	.1845	.1841
Germany.. .. ..Mk.	1.	.238	.000014	.000011
Greece.. .. ..Dr.	1.	.193	.0434	.0281
Norway.. .. ..Kr.	1.	.268	.1710	.1709
Sweden.. .. ..Kr.	1.	.268	.2718	.2723
Denmark.. .. ..Kr.	1.	.268	.1872	.1806
Japan.. .. ..Yen	1.	.498	.5042	.5030
India.. .. ..R.	1.	2s.	.3191	.3187
United States.. .. ..$	1.	$1.00	1.0212	1.0240
Mexico.. .. ..$	1.	.498	.4965	.4966
Argentina.. .. ..Pes.	1.	.424	.3625	.3525
Brazil.. .. ..Mil.	1.	.324	.1059	.1075
Roumania.. .. ..Lei	1.	.198	....	....
Jamaica.. .. ..£	1.	4.86	4.7360	4.7420
British Guiana.. .. ..$	1.	1.	.9804—.9829	.9690—.9984
Barbados.. .. ..$	1.	1.		
Trinidad.. .. ..$	1.	1.		
Dominica.. .. ..$	1.	1.		
Grenada.. .. ..$	1.	1.		
St. Kitts.. .. ..$	1.	1.		
St. Lucia.. .. ..$	1.	1.		
St. Vincent.... .. ..$	1.	1.		
Tobago.. .. ..$	1.	1.		
Shanghai, China.. .. ..Tael	1.	.708	.7455	.7488
Batavia, Java.. .. ..Guilder	1.	.402	.3906	.3917
Singapore, Straits Settlements...$	1.	.567	.5578	.5593

IMPROVING TRADE PROSPECTS OF ARGENTINA

An almost magical change has taken place in the cattle trade of Argentina, writes a correspondent of the *Manchester Guardian Commercial.* Stated as briefly as possible, the position now is that for all classes of cattle, from the native steers, saleable only to canning factories or the few remaining *saladeros,* or killing yards making jerked beef for the Cuban market, to the picked cross-bred steers sought by freezing works and marketed as chilled beef, prices are up, broadly speaking, 20 per cent; and the tendency is towards a further improvement. All forms of general produce, from horsehair to dry hides—and even baled cotton,—are firm. The southern woods, now coming up from Santa Cruz Territory, are bringing prices reminiscent of war time, with the result that producers, great and small, are full of optimism and are again feeling liberally, not to say extravagantly disposed. In no Latin market of the size and importance of Argentina must this psychological factor of successful trade be overlooked. Argentina is buying now more freely than she has done since 1919, and she is able and willing to buy high-class goods in all lines.

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Quebec, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1730. Flour.—A commission agent in Port of Spain, Trinidad, is desirous of obtaining a Canadian flour agency—to be supplied in cotton bags of 196 pounds (machine sewn), c.i.f., in grades known as baker's, extras and supers.

1731. Flour, Oats, Canned Goods.—A commission merchant of Havana, Cuba, wishes to represent in the Cuban market, on a brokerage or commission basis, Canadian exporters of wheat flour, oats, and canned foodstuffs.

1732. Flour.—A New York firm of exporters, with agencies in Cuba, Mexico, Porto Rico, and San Domingo, desire to represent Canadian manufacturers of flour suitable for bakeries in these places. Business for the main ports would be done on a commission basis, but this firm would buy outright for the outlying districts.

1733. Food Products.—A French firm wish to secure the agency of Canadian exporters of food products generally; also cereals of all kinds (barley, maize, rye, etc.)

1734. Alsike.—A firm in Switzerland ask for the addresses of Canadian exporters of alsike.

1735. Butter.—A Liverpool firm desire to secure an agency for butter.

1736. Cereals and Sugar.—A Glasgow firm would be glad to hear from reliable shippers in Canada of cereals and sugar.

1737. Hard-boiled Candies.—A Singapore house desires c.i.f. price Singapore and samples of same put up in bottles with waxed corks and screw metal tops. Must be cheap, as business is for Tamil coolie trade. A sample bottle forwarded for inspection. The bottles are much used by coolies after sweets are eaten and should be of an appealing shape.

1738. Canned Sweet Corn.—A well-established merchant house in Singapore would be glad to receive sample of canned sweet corn, to ascertain whether same would be acceptable on this market.

1739. Canned Sardines.—A well-established merchant house in Singapore wishes to receive samples and c.i.f. quotations of canned sardines (pilchards). To be packed in tomato sauce in flat ovals 15 ounces. Price per case of 48 tins around $8.50 (Straits currency).

Miscellaneous

1740. Representation.—A firm in Hamburg desire to act as the representatives of Canadian manufacturers.

1741. Newsboards.—A Liverpool firm of paper importers ask for quotations on newsboards, 22 by 32, from 50 to 600 sheets.

1742. Boxboards.—A Liverpool firm desire to act as agents for a first-class boxboard house.

1743. Ruler Blanks.—A Birmingham manufacturer of steel and wood rulers desires quotations for maple blanks suitable for levels and rules.

1744. Kraft and Other Wrapping Paper.—A Liverpool firm ask to be placed in touch with exporters of kraft and other wrapping paper.

1745. Writing and Tissue Paper.—A Liverpool firm ask for quotations on writing and tissue paper.

1746. Writing and Bond Papers.—A Liverpool firm ask to be placed in touch with exporters of writing and bond papers.

1747. Canadian Woods.—A French firm want to be put in touch with an exporter of Canadian woods.

1748. Barks for Dyeing and Tanning Extract and Pharmaceutical Products.—A Milan firm are anxious to open up a business connection with Canadian exporters.

1749. Chemicals, Metals and Glass.—A Milan firm desire to import from Canada chemicals, metals and glass.

1750. Chemical By-products; Metals; Iron Scrap; Spelter and Copper Ingots.—A Genoa firm are desirous to be put in touch with Canadian houses prepared to export the foregoing commodities.

1751. Chemicals.—A Belgian importer of chemical products, i.e., acetic acid, lime salt, white lead, Carlsbad salt, etc., wishes to receive offers from Canadian exporters.

1752. Bioxide of Manganese and Graphite are requested by a Milan concern.

1753. Ferro-Silicon.—A Sheffield firm are interested in offers of the above, in grades as follows: 10/12 per cent, 20/25 per cent, 45/50 per cent, 75/80 per cent, and 90/95 per cent.

1754. Ferro-Silicon.—A Sheffield firm desire quotations on ferro-silicon of the following grades: 45/50 per cent Si contents, and 70/75 per cent Si contents.

1755. Ferro-Silicon.—A Sheffield firm are interested in offers of ferro-silicon.

1756. Ferro-Chrome.—A Sheffield firm are interested in offers of ferro-chrome.

1757. Ferro-Chrome.—A Sheffield firm are interested in offers of the above in grades as follows: 10/12 per cent, 20/25 per cent, 45/50 per cent, 75/80 per cent, and 90/95 per cent.

1758. Aluminium.—A Sheffield firm are interested in aluminium in notched bar form, of a purity of 97/98 per cent.

1759. Aluminium.—A Sheffield firm are prepared to consider offers of aluminium.

1760. Nickel.—A Sheffield firm are prepared to consider offers of nickel.

1761. Cobalt.—A Sheffield firm are prepared to consider offers of cobalt.

1762. Asbestos.—An importer of Antwerp, established since 1914, wishes to enter into relations with Canadian asbestos mine owner with view to sole representation in Belgium.

1763. Wire Rods.—A Sheffield firm desire quotations direct from the works on open-hearth basic soft wire rods, of grades as follows: Grade 1, carbon not exceeding 10 per cent; Grade 2, carbon not exceeding 8 per cent to 12 per cent.

1764. Mattress Wire, Steel Products, and Oil Well Supplies.—A New York firm desire to receive communications from manufacturers of mattress wire, oil well supplies, and steel products marketable in Cuba. Will buy certain commodities outright, but will also act as agents.

1765. Industrial Products.—A civil engineer, who has for the past two years devoted himself entirely to sale of industrial products, wishes to represent Canadian firms in Belgium and Luxembourg for all industrial products, especially those of interest to the engineering trade.

1766. Raw Material for Soap Industry, Paraffin, and Electrical Supplies.—An Italian company would be willing to be put in touch with Canadian dealers.

1767. Wire Nails.—A well-established English house handling large quantities of wire nails, countersunk checkered heads (kegs each 1 picul = 133⅓ pounds net), burlapped, paper-lined, as follows: 60 kegs, 1½ by 13 G.; 80 kegs, 1¾ by 12 G.; 40 kegs, 1¾ by 13 G.; 150 kegs, 2 by 11 G.; 60 kegs, 2¼ by 11 G.; 120 kegs, 2½ by 10 G.; 30 kegs, 2½ by 11 G.; 140 kegs, 3 by 8 G.; 40 kegs, 3½ by 7 G.; 120 kegs, 4 by 6 G.; 40 kegs, 5½ by 6 G.; 120 kegs, 5 by 5 G., require quotations from time to time c.i.f. Singapore. No other sizes acceptable except the ones stated. Kegs essential; case packing not accepted.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From Montreal

To Antwerp.—Melita, Canadian Pacific Steamships, Ltd., June 20; Canadian Conqueror, Canadian Government Merchant Marine, June 20; Bolingbroke, June 30; Minnedosa, July 3—both Canadian Pacific Steamships, Ltd.; Canadian Victor, Canadian Government Merchant Marine, July 4; Rawtry, Canadian Pacific Steamships, Ltd., July 7.

To Avonmouth.—Salacia, Anchor-Donaldson Line, June 23; Welshman, White Star-Dominion Line, June 29; Parthenia, Anchor-Donaldson Line, July 7; Caledonian, July 7; Oxonian, July 14—both White Star-Dominion Line.

To Belfast.—Marburn, June 21; Marloch, June 28; Metagama, July 5—all Canadian Pacific Steamships, Ltd.

To Belfast and Dublin.—Melmore Head, Head Line, June 24.

To Cardiff and Swansea.—Canadian Challenger, Canadian Government Merchant Marine, June 29.

To Cherbourg.—Melita, Canadian Pacific Steamships, Ltd., June 20; Andania, Anchor-Donaldson Line, June 23; Minnedosa, Canadian Pacific Steamships, Ltd., July 3; Antonia, Anchor-Donaldson Line, July 7.

To Copenhagen and Baltic Ports.—General Konsul Pallisen, June 24; Helmer Morch, June 30; Florida, July 8—all Scandinavian-American Line.

To Dundee and Hull.—Cornish Point, June 19; Ariano, July 14—both Furness Line.

To Glasgow.—Marburn, Canadian Pacific Steamships, Ltd., June 21; Cassandra, Anchor-Donaldson Line, June 22; Marloch, Canadian Pacific Steamships, Ltd., June 28; Gracia, Anchor-Donaldson Line, June 28; Metagama, Canadian Pacific Steamships, Ltd., July 5; Athenia, July 6; Saturnia, July 13—both Anchor-Donaldson Line.

To Hamburg.—Ramore Head, Head Line, June 20; Deuel, Rogers & Webb, June 25; Fanad Head, Head Line, June 27; Hoerda, July 4; Porsenger, July 7—both I.C. Transports, Ltd.; West Kebar, Rogers & Webb, July 10.

To Havre.—Hastings County, I.C. Transports, Ltd., June 18.

To Liverpool.—Montclare, Canadian Pacific Steamships, Ltd., June 22; Doric, White Star-Dominion Line, June 23; Kastalia, Cunard Line, June 24; Montcalm, Canadian Pacific Steamships, Ltd., June 29; Coracero, Cunard Line, June 29; Canada, White Star-Dominion Line, June 30; Montrose, Canadian Pacific Steamships, Ltd., July 6; Lakonia, Cunard Line, July 6; Regina, White Star-Dominion Line, July 7; Corinaldo, Cunard Line, July 13; Megantic, White Star-Dominion Line, July 14.

To London.—Hastings County, I.C. Transports, Ltd., June 18; Canadian Conqueror, Canadian Government Merchant Marine, June 20; Andania, Cunard Line, June 23; Virgilia, Cunard Line, June 30; Bolingbroke, Canadian Pacific Steamships, Ltd., June 30; Vasconia, Cunard Line, June 30; Chickahominy, Furness Line, June 30; Canadian Victor, Canadian Government Merchant Marine, July 4; Bawtry, Canadian Pacific Steamships, Ltd., July 7; Antonia, Cunard Line, July 7; Grey County, I.C. Transports, Ltd., July 12; Verentia Cunard Line, July 14; Alleghany, Furness Line, July 14.

To London and Antwerp.—Canadian Conqueror, June 20; Canadian Victor, July 4—both Canadian Government Merchant Marine.

To Manchester.—Manchester Corporation, June 21; Manchester Regiment, June 28; Manchester Shipper, July 5; Manchester Division, July 12—all Manchester Lines, Ltd.

To Newcastle and Leith.—Cairnvalona, June 22; Cairndhu, June 29; Cairnavon, July 6—all Thomson Line.

To Norwegian Ports.—Idefjord, Norwegian-American Line, July 14.

To Rotterdam.—Ramore Head, Head Line, June 20; Deuel, Rogers & Webb, June 25; Fanad Head, Head Line, June 27; Hoerda, I.C. Transports, Ltd., July 4; West Kebar, Rogers & Webb, July 10; Welland County, I.C. Transports, Ltd., July 14.

To Southampton.—Melita, Canadian Pacific Steamships, Ltd., June 20; Minnedosa, Canadian Pacific Steamships, Ltd., July 3.

To St. John's (Nfld.), *via* Charlottetown (P.E.I.).—Manoa, Canada Steamship Lines, June 23; Canadian Sapper, Canadian Government Merchant Marine, June 26, July 17, and fortnightly sailings.

To Australia and New Zealand—Melbourne, Sydney, Auckland, Wellington, Lyttleton, Dunedin.—Canadian Cruiser, Canadian Government Merchant Marine, Ltd., June 26; Trewyn, New Zealand Steamships, Ltd., July 11.

To Bermuda, Barbados, Trinidad and Demerara.—Borden, Canadian Pacific Steamships, Ltd., June 26.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—Canadian Fisher, Canadian Government Merchant Marine, July 5.

To St. Kitts, Antigua, Barbados, Trinidad and Demerara.—Canadian Squatter, Canadian Government Merchant Marine, June 27.

To South America—Rio de Janeiro, Santos, Montevideo, Buenos Aires, Bahia Blanca.—Hilarius, Houston Line, July 1.

From Quebec

To Liverpool.—Canada, June 30; Regina, July 7; Megantic, July 14—all White Star-Dominion Line; Montlaurier, Canadian Pacific Steamships, Ltd., July 13.

To Southampton, Cherbourg and Hamburg.—Empress of France, June 23; Empress of Britain, June 30; Empress of Scotland, July 7—all Canadian Pacific Steamships, Ltd.

From Halifax

To Bermuda, St. Kitts, Antigua, Montserrat, Dominica, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad and British Guiana.—Royal Mail Steam Packet Co., June 22, and every fortnight.

From North Sydney, N.S.

To Newfoundland.—Kyle, Newfoundland Government Railway Commission, tri-weekly (Tuesday, Thursday and Saturday).

To St. John's, Nfld. (via Charlottetown, P.E.I.).—Canadian Sapper, Canadian Government Merchant Marine, June 21.

From Vancouver

To LIVERPOOL, LONDON, ROTTERDAM AND ANTWERP.—Loch Goil, Royal Mail Steam Packet Co., early July.

To LONDON, ROTTERDAM AND ANTWERP.—Drechtdyk, Holland-American Line, June 28; Dinteldyk, Royal Mail Steam Packet Co., late July.

To HONOLULU, SUVA, AUCKLAND AND SYDNEY.—Makura, Canadian-Australasian Royal Mail Line, June 29; Niagara, Canadian-Australasian Royal Mail Line, Aug. 3.

To AUCKLAND, SYDNEY, MELBOURNE AND ADELAIDE.—Canadian Scottish, Canadian Government Merchant Marine, June 20.

To NEW ZEALAND AND AUSTRALIA.—Waikawa, Canadian-Australasian Royal Mail Line, July 18.

To MELBOURNE AND SYDNEY.—Wairuna, Canadian-Australasian Royal Mail Line, July 14.

To WELLINGTON, MELBOURNE AND SYDNEY.—Hauraki, Canadian-Australasian Line, Aug. 14.

To INDIA.—Canadian Winner, Canadian Government Merchant Marine, June 20.

To YOKOHAMA AND KOBE.—Toyama Maru, June 22; Hakata Maru, July 13; Tokiwa Maru, July 30—all Nippon Yusen Kaisha Line.

To YOKOHAMA, KOBE AND SHANGHAI.—Canadian Transporter, June 25; Canadian Highlander, July 25—both Canadian Government Merchant Marine.

To YOKOHAMA, KOBE, SHANGHAI AND BOMBAY.—Canadian Winner, Canadian Government Merchant Marine, June 20; Canadian Transporter, Canadian Government Merchant Marine, June 30.

To YOKOHAMA, KOBE, SHANGHAI AND HONG KONG.—Empress of Canada, June 28; Empress of Australia, July 26—both Canadian Pacific Steamships, Ltd.

To YOKOHAMA, KOBE, MOJI, SHANGHAI, HONG KONG.—Alabama Maru, Osaka Shosen Kaisha Line, July 18—also calls at Dairen, Manchuria.

To YOKOHAMA, KOBE, NAGASAKI, SHANGHAI AND HONG KONG.—Empress of Russia, Canadian Pacific Steamships, Ltd., July 12.

To YOKOHAMA, KOBE, MOJI, SHANGHAI AND MANILA.—Hawaii Maru, Osaka Shosen Kaisha, July 8.

To YOKOHAMA, KOBE, SHANGHAI, HONG KONG AND MANILA.—Harold Dollar, Canadian Robert Dollar Co., July 10.

To YOKOHAMA, KOBE, HONG KONG, MANILA, AND CEBU, P.I.—Achilles, July 12; Philoctetes, Aug. 2—both Blue Funnel Line.

From Victoria

To HONOLULU, SUVA, AUCKLAND AND SYDNEY.—Makura, Canadian-Australasian Royal Mail Line, June 30; Niagara, Canadian-Australasian Royal Mail Line, Aug. 4.

To MANILA (via Oriental Ports).—Admiral, Pacific Steamship Company, June 18, and every twelve days.

To YOKOHAMA, KOBE, SHANGHAI AND HONG KONG.—Empress of Canada, June 28; Empress of Australia, July 26—both Canadian Pacific Steamships, Ltd.

To YOKOHAMA, KOBE, NAGASAKI, SHANGHAI AND HONG KONG.—Iyo Maru, Nippon Yusen Kaisha, June 30; Empress of Russia, Canadian Pacific Steamships, Ltd., July 12; Shidzuoka Maru, Nippon Yusen Kaisha, July 16; Yokohama Maru, Nippon Yusen Kaisha Line, Aug. 4.

To YOKOHAMA, KOBE, MOJI, DAIREN, SHANGHAI AND HONG KONG.—Africa Maru, Osaka Shosen Kaisha, June 22.

To YOKOHAMA, KOBE, SHANGHAI, HONG KONG AND MANILA.—President Madison, Admiral Oriental Line, June 17; Empress of Canada, Canadian Pacific Steamships, Ltd., June 28.

Canadian Manufacturers and Exporters are strongly advised to file all numbers of the "Commercial Intelligence Journal" for future reference, and to bind them with the Index at the end of each half year.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

Lucien Pacaud, Secretary to the Office of the High Commissioner for Canada in London, 19 Victoria street, London, S.W., England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada, and Newfoundland, 285 Beaver Hall Hill, Montreal, Que. Telegraphic address: "Britcom."

The British Trade Commissioner (for Ontario), 24 Adelaide St. West, Toronto, Ont. Telegraphic address: "Toroncom."

The British Trade Commissioner (for British Columbia), 210 Winch Bldg., Vancouver. Telegraphic address: "Vancom."

The Officer-in-Charge, British Trade Commissioner's Office, 703 Union Bank Bldg., Winnipeg. Telegraphic address: "Wincom."

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address, Canadian.*

Australia

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil

E. L. McColl. Address for letters—Caixa Postal 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China

J. W. Ross. Address for letters—P.O. Box 300. Office—Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba

Address: 400 and 401 Teniente Rey 11, Havana. (Post Office Box 1290.) *Cable Address, Cantracom.*

France

Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland

Norman D. Johnston, Zuidblaak 26, Rotterdam, *Cable Address, Watermill.*

India and Ceylon

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico

C. Noel Wilde. Address for letters, Apartado Num. 126-bis, Mexico City. Office, Edificio Banco de Londres y Mexico, Num. 30. *Cable Address, Cancoma.*

New Zealand

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa

W. J. Egan, P.O. Box 683; office, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements

A. B. Muddiman, P.O. Box 121, Singapore. (Territory covers Straits Settlements. British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

Douglas S. Cole, Acting Trade Commissioner, Sun Building, Clare street, Bristol. *Cable Address, Canadian.*

Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States

Frederic Hudd, 44 Whitehall street, New York City. *Cable Address, Cantracom.*

CANADIAN COMMERCIAL AGENTS

Australia

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark

C. E. Sontum, Grubbegd, N. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

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Commercial Intelligence Journal

Vol. XXVIII June 23, 1923 No. ~~1012~~ 1013

SUBSCRIPTIONS TO THE COMMERCIAL INTELLIGENCE JOURNAL FOR THE YEAR BEGINNING JULY 1 ARE NOW DUE: $1 PER ANNUM TO ADDRESSES IN CANADA (SINGLE COPIES 5 CENTS EACH); $3.50 TO ADDRESSES OUTSIDE THE DOMINION (SINGLE COPIES 10 CENTS EACH). IT WILL BE ASSUMED THAT READERS WHO DO NOT FORWARD THEIR SUBSCRIPTIONS BEFORE THE 1st OF JULY NO LONGER DESIRE TO RECEIVE THIS PUBLICATION, AND THEIR NAMES WILL ACCORDINGLY BE REMOVED FROM THE MAILING LIST. REMITTANCES MAY BE MADE BY POST OFFICE OR EXPRESS ORDERS, OR DRAFTS, OR CHEQUES, PAYABLE AT PAR IN OTTAWA.

NOTE—THE SUBSCRIPTION PRICE FOR THE PROJECTED FRENCH EDITION OF THE "JOURNAL" WILL NOT APPLY UNTIL JANUARY 1, 1924.

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

Printed by F. A. ACLAND, Printer to the King's Most Excellent Majesty

1002

TABLE OF CONTENTS

Commercial Intelligence Journal

Issued Every Saturday by the Department of Trade and Commerce

Ottawa June 23, 1923 No. 1012

THE APATHY OF EXPORTERS

Despite the fact that the subjoined notice with regard to the supply of foodstuffs for the British Empire Exhibition has been published in four issues of the *Commercial Intelligence Journal*, the response up to date has been disappointingly meagre. The Department—which has gone to considerable trouble in organizing in London a working force to assist Canadian suppliers of foodstuffs to furnish their goods to the great restaurant in the grounds of the Exhibition—in inviting an awakened interest and a fuller co-operation on the part of foodstuffs exporters, urges on patriotic as well as on business grounds that Canadian firms should make a special effort to be on the list of suppliers, as the benefits of successful tender are likely to accrue to them long after the period of the Exhibition.

BRITISH EMPIRE EXHIBITION: NOTICE TO FOOD EXPORTERS

As already announced in the *Commercial Intelligence Journal*, plans for Canada's participation in the British Empire Exhibition to be held in Wembly Park, near London, England, from April 20 to October 31 next year, are practically completed.

Canada expects to have an exhibition worthy of its name. The Canadian Government exhibit will be under the direction of the Minister of Trade and Commerce, who for this purpose will have under his jurisdiction the staff of the Dominion Government Exhibition Commissioner.

This department therefore desires, as a preliminary announcement, to state that within the grounds of Wembly Park, where the great exhibition is to be held, will be constructed the Canadian Building. The Empire Exhibition Executive will also construct a special building to be used as a restaurant, in which products of the Empire only will be used, provided they can compete successfully in quality and price with similar foreign commodities.

It is anticipated that the exhibition will be visited by millions of people and a unique opportunity will thus be afforded for manufacturers and producers of foodstuffs throughout the Empire to advertise their products to the world.

Arrangements have not yet advanced sufficiently to permit of any detailed announcement, but it is desirable that it should be known among Canadian exporters of foodstuffs that the Department of Trade and Commerce is prepared in every possible way to assist Canadian suppliers of foodstuffs throughout the period of the exhibition. For this purpose it is suggested that firms interested, and who are not now represented in London or elsewhere in the United Kingdom, should arrange to appoint agents in London, to whom all information can be provided so that on short notice during the period of the exhibition prices and

supplies can be made available. The department desires to make a special appeal, in view of the importance of the exhibition, to firms who supply foodstuffs, to supply only the best grade of products. Active steps are being taken in the other Overseas Dominions to win first place for their various products, and the keenest competition may be anticipated.

The Department of Trade and Commerce will provide a special officer detailed in London who will act as liaison officer between Canadian suppliers of foodstuffs and the authorities in charge of the restaurant.

Canadian firms, therefore, interested in supplying Canadian goods to the exhibition authorities, should communicate with The Deputy Minister, Department of Trade and Commerce, Ottawa, giving the names and addresses of their agents or jobbers in the United Kingdom and full information regarding the foodstuffs they can supply, so that arrangements may be made well in advance. The department will also welcome helpful suggestions.

TRADE COMMISSIONER J. E. RAY'S ITINERARY IN ONTARIO

Mr. J. E. Ray, Canadian Trade Commissioner, Manchester, who has been on a business tour in the Maritime Provinces and Quebec, will shortly undertake a tour of Ontario, the itinerary for which is as follows:—

Ottawa	June 28 to 30	Chatham	July 25
Belleville	July 4	London	July 26 to 28
Toronto	July 5 to 14	Ingersoll	July 30
Guelph	July 16 to 18	Brantford	July 31 to August 1
Galt	July 19	Welland	August 2
Kitchener	July 20 to 23	St. Catharines	August 3 to 6
Stratford	July 24	Hamilton	August 7 to 9

Firms in Toronto who desire to be brought in touch with Mr. Ray or to interview him, should direct their communications to the Secretary of the Canadian Manufacturers Association or to the Secretary of the Board of Trade, and in the case of Hamilton to the Secretary of the Chamber of Commerce of that city. In the case of all other cities and towns included in the itinerary, requests for interviews should be addressed to the local Chamber of Commerce or Board of Trade.

BRITISH PREFERENTIAL TARIFFS APPLICABLE TO CLOTHING OF CANADIAN ORIGIN*

(Compiled by the Foreign Tariffs Division, Commercial Intelligence Branch)

In the case of the British West Indies and other colonies where tariff items are not quoted in detail, the rates of duty given apply to all kinds of clothing. The term "clothing," as used, relates to ordinary wearing apparel for the human body. It includes hats, caps, and millinery, but not boots and shoes. The rates of duty given below in the column headed "British preferential tariff" apply to Canada, also to the United Kingdom, and usually to all parts of the British Empire or to certain specified portions of it. The general tariff in all cases is applicable to goods, the origin of any country outside the British Empire. The statement does not take into account goods imported for special purposes, for example, naval and military uniforms and for which provision may be made for exemption from duty.

* While an effort is made to obtain the latest and most reliable information on customs duties in force in other countries, it is not practicable, in view of the tariff changes that are being constantly made and on account of possible difficulties which may arise in interpreting tariffs to guarantee that information published on this subject is in every instance up-to-date and absolutely correct.

NEW ZEALAND

	British Preferential Tariff. %	General. Tariff. %
Apparel, ready-made clothing, hosiery, not elsewhere included in the tariff (item 228).. ad valorem	25	40
Hats and caps (item 237).. ad valorem	25	40
Millinery (item 238).. ad valorem	25	40
Apparel made to the order, or measurement, of residents in New Zealand, and intended for the individual use of such residents; uniform clothing made to measurements sent from New Zealand (item 227).. ad valorem	40	60
Haberdashery, not elsewhere included in the tariff (item 226).. ad valorem	20	35

A primage duty of one per cent ad valorem is levied in addition to the rates quoted. Invoice values are increased ten per cent for duty purposes in New Zealand.

UNION OF SOUTH AFRICA

	British Preferential Tariff. %	General. Tariff. %
Coats, jackets, or other apparel made of blanketing or baize, not elsewhere enumerated (in the tariff) (item 58).. ad valorem	22	25
Clothing, bespoke, or made by a tailor or dressmaker to the order of an individual (not including underclothing) (item 60).. ad valorem	22	25
Shawls (item 72).. ad valorem	22	25
Clothing not otherwise charged with duty but not including articles of adornment merely, articles of silk or imitation silk, nor furs and muffs; (item 193a).. ..ad valorem..	12	15
Hats and caps (item 193a).. ad valorem	12	15
Clothing not provided for in 193 (a) or any other item of the tariff, ad valorem (item 193)..	17	20

NORTHERN RHODESIA (EXCEPT CONGO BASIN) AND SOUTHERN RHODESIA

Coats, jackets, or other apparel made of blanketing or baize, not elsewhere enumerated (in the tariff), (item 58).. ad valorem	17	20
Clothing, bespoke, or made by a tailor or dressmaker to the order of an individual (not including underclothing (item 60)).. ad valorem	9	25
Shawls, (item 72).. ad valorem	20	25
Clothing not otherwise charged with duty but not including articles of adornment merely, articles of silf or imitation silk, nor furs and muffs, (item 193 (a)).. ..ad valorem..	9	15
Hats and caps (193a).. ad valorem	9	15
Clothing not provided for in 193(a) or any other item of the tariff (item 193).. ad valorem	9	20

BRITISH WEST INDIES

		British Preferential Tariff. %	General. Tariff. %
Barbados, Clothing (items 3, 35, 45, 47, 61, 83, 101)..	ad valorem	12	24
British Guiana, clothing (as goods not mentioned)..	"	16–⅔	33–⅓
British Honduras, clothing (items 3, 34, 45, 47, 61, 84, 102)..	"	10	20
Trinidad, clothing (items 3, 35, 46, 48, 69, 85, 103)..	"	10	20
Grenada, clothing (items 3, 46, 48, 62, 86, 104)..	"	12½	18¾
St. Vincent, clothing (items 3, 35, 46, 62, 86, 104)..	"	11	16½
St. Lucia, clothing (items, 3, 35, 46, 48, 62, 86, 104)..	"	10	15
Antigua, clothing (as goods not mentioned)..	"	10	15
Dominica, clothing (items 3, 35, 46, 48, 62, 86, 104)..	"	10	15
St. Kitts-Nevis, clothing (as goods not mentioned)..	"	10	15
Montserrat, clothing (as goods not mentioned)..	"	10	15
Virgin Islands, clothing (as goods not mentioned)..	"	8	12
Jamaica, clothing (as goods not mentioned)..	"	15	20
Bahamas, clothing (as goods not mentioned)..	"	18–¾ (a)	25 (a)

(a) (Under a tariff amendment act of 1920, a drawback of 50% of duties is allowed which would reduce by half the rates quoted, both preferential and general.)

CYPRUS

Clothing (as goods not mentioned).. .. .. (Preference of $\frac{1}{6}$ off full rate applies to woollen manufactures, haberdashery and millinery.)	"	$\frac{2}{3}$ or $\frac{5}{6}$ of full rate	10

FIJI

Clothing (as goods partly unenumerated)..	"	15	27½

SAMOA MANDATED TERRITORY

Clothing (as goods not mentioned)..	"	15	22½

HOW TO ESTABLISH AN EXPORT DEPARTMENT

It may be stated in broad terms, writes a correspondent in the London *Times Trade Supplement,* that an export department added to a business automatically acts as an insurance for home trade, and it is possible for a very large proportion of manufacturers and traders to introduce such a department into their business at small expense and with every prospect of satisfactory results, provided they approach it intelligently.

Naturally the first thing a trader must consider is which markets offer the best prospects for the particular lines in which he is interested. He must study the peculiarities, the manners, and the customs of the country he selects; he must remember that the people he wishes to cultivate are of a different race, temperament, and probably language; that they have different ways of thinking, different business methods, different laws, and in the majority of cases vastly different custom house laws and regulations. In short, in order to achieve the greatest success he must adapt himself and his tactics to his customers' ideas, whims, and fancies. To him they may seem peculiar, but he must always remember that it is he who is the foreigner, not they. Profits are usually considerably greater than those secured in the home trade, while the expenses of conducting the department are certainly no higher.

STUDY OF THE MARKETS

A careful study of the markets is a very necessary preliminary, and much exceedingly valuable information can be obtained from custom house returns. Such study frequently results in material saving of expense, since what will be keenly appreciated in one country will fall flat in another, and no amount of energy and push will ever render it successful. As an illustration of this may be mentioned an utterly futile campaign of American manufacturers to market certain breakfast foods in South America. The cereals were lavishly advertised, house-to-house distributions of free samples made, demonstration booths were erected in stores, hotels, and clubs, where dishes were served without any charge in the most tempting styles to all willing to try them. Enormous sums were lost in this propaganda, since the products utterly failed to appeal to the public. The campaign was not confined to one country, but was prosecuted throughout practically the whole of Latin America, each country producing negative results.

Had the manufacturers but made a study of the markets and the peculiarities of the inhabitants they would have been saved much loss of both money and prestige. Customs of countries are always difficult to eradicate, and particularly is this the case when they date back for centuries and become traditions. A survey of even the methods of living of Latin races would have at once elicited the fact that their breakfast is of the lightest, and never varies from coffee and rolls.

As an illustration of good marketing may be cited the case of a prominent Japanese firm who manufactured agar-agar. Their output grew until it was far larger than their home market demanded. Prices were rapidly falling and they were faced with severe losses. Their trade was entirely confined to their own country. They conceived the idea of adding an export branch to their business. They made a careful study of the world's markets and ascertained which countries were the principal consumers of the commodity they manufactured. They then proceeded to get the market prices ruling in the various countries and the names of the leading importers. They allocated their stocks proportionately to the requirements of the countries. The next procedure was to send samples and quotations calculated to secure the trade to the prospective customers, giving them a firm offer for a certain period of a limited amount, at the same time issuing a brief market report on the commodity, showing all the available stocks known and price fluctuations. In many cases offers were made for their entire output, but the answer was always to the effect that they would not supply more than the prescribed amount allotted to each individual territory, as their other customers' requirements must be complied with. The direct result was that in a very short time they had built up a regular trade spread over the whole world and could look forward to the sale of their entire output at remunerative prices year after year through the same channels. Had they followed the lines of least resistance and allowed one firm to purchase the whole parcel they might have made more money the first year, it is true, but each succeeding year would have brought its own troubles, and, by not putting all their eggs into one basket, they have established world-wide connections and now virtually control the agar-agar trade of the world. Apart from this line they have utilized their overseas correspondents for various other goods, to mutual advantage.

These two illustrations are well worthy of the attention of all those contemplating adding an export department to their businesses, and conclusively prove the value and necessity of a careful study of the trade possibilities and requirements, as well as the impossible trade barriers, which exist in every country.

However, let it be assumed that the investigation made denotes the practicability of overseas trade in any line handled. By the addition of an export department a trader may materially add to his returns, and the greater number of countries to which he can extend his operations the better in the long run. When one country suffers from a drought and crops are short in consequence, business there is naturally checked, but it is usually the case that other parts of the world produce bumper harvests, resulting in high prices and prosperity.

RAILWAY EXTENSIONS IN CHINA

Railway construction is more disturbed by the disorder in China, says the *British Export Gazette,* but even in this direction it is of interest to learn that funds are obtainable in Europe for needed extensions—that between Shenchow, on the Yellow River, and Haichow, on the coast 500 miles distant, being a case in point. There are now upwards of 8,000 miles of railway in China, or only 2,000 miles short of the programme outlined by Dr. Sun Yat-Sen some ten years ago. It is already recognized, however, that 10,000 miles of railway can be regarded only as a beginning of China's transport needs of this type, and once the communications of the country are permanently out of the hands of the military and the bandits, it may be anticipated that a large number of projects will be taken in hand, involving valuable contracts for material and rolling stock.

EXPORTS FROM CANADA TO THE UNITED STATES OF PRINCIPAL COMMODITIES PRODUCED ON CANADIAN FARMS, OR MANUFACTURED DIRECTLY FROM SUCH FARM PRODUCTS, DURING THE MONTH AND EIGHT MONTHS ENDED MAY, 1920 to 1923; WITH UNITED STATES TARIFF RATES IN FORCE.

(COMPILED BY EXTERNAL TRADE BRANCH, DOMINION BUREAU OF STATISTICS)

Commodities	Month of May				Eight months ended May				United States Tariff Rates in force		
	1920	1921	1922	1923	1920	1921	1922	1923	Prior to May 27, 1921	From May 27, 1921 to Sept. 21, 1922	Subsequent to Sept. 21, 1922
Animals (except for improvement of Stock)-											
Cattle ... No.	8,565	14,692	3,438	5,975	324,842	212,958	113,730	122,669			
$	188,075	457,713	57,290	156,779	27,884,152	14,561,036	2,100,619	3,429,210	Free	30 p.c.	(a)
Horses ... No.	250	80	118	109	1,921	1,493	1,419	1,095			
$	46,565	21,143	15,497	14,565	327,409	348,775	319,891	159,243	10 p.c.	10 p.c.	(b)
Poultry ... No.	3,527	16,072	7,703	2,140	499,626	580,514	572,799	413,251			
$	4,339	16,757	7,026	1,482	516,810	654,687	568,458	395,785	1 c. per lb.	1c. per lb.	3c. per lb.
Sheep ... No.	79	146	133	2,051	137,542	121,646	58,203	31,398			
$	2,369	1,275	2,401	19,996	1,474,319	1,096,747	327,503	213,519	Free	(c)	$2 per head
Fruits—											
Apples, green or ripe ... Brl.	2,152	139	1	261	239,863	12,190	393,309	62,612			
$	4,450	686	6	1,161	821,910	61,492	2,000,710	291,599	10c. per bush.	30c. per bush	25c. per bush.
Apples, dried ... Lb.					711,829		658,754	65,700			
$					93,775		76,092	7,120	1c. per lb.	1c. per lb.	2c. per lb.
Berries, fresh ... $				115	31,094	28,874	46,227	62,873	½c. per qt.	½c. per qt.	1c. per lb.
Grains—											
Barley ... Bush.	179,946	105	4		242,122	298	16,629	926,945			
$	309,595	163	5		390,087	420	12,172	497,869	15c. per bush.	15c. per bush.	20c. per bush.
Beans ... Bush.	4,466	845	4	8,888	8,843	3,568	4,147	77,430			
$	18,061	3,634	18	24,568	39,730	14,690	13,104	232,702	25c. per bush.	$1.20 per bush.	$1.05 per bush.
Buckwheat ... Bush.	18,392	7,045	2,508	19,170	95,106	226,994	98,230	239,381			
$	31,661	9,422	2,529	17,828	149,890	264,392	82,603	199,414	Free	Free	10c. per cwt.
Oats ... Bush.	1,680,326	732,126	147,099	4,198	4,650,666	2,224,516	1,778,698	181,306			
$	1,871,968	301,780	66,104	2,792	4,478,969	1,105,375	846,452	93,551	6c. per bush.	6c. per bush.	15c. per bush.
Pease, whole ... Bush.	23	4,294	1,800	3,257	51,289	59,537	103,925	149,430			
$	258	7,175	4,059	7,547	328,050	278,727	344,543	384,986	10c. per bush.	10c. per bush.	60c. per bush.
Pease, split ... Bush.	5	467			7,960	4,205	14,455	3,157			
$	36	1,168			30,354	11,370	54,180	9,937	20c. per bush.	20c. per bush.	75c. per bush.
Rye ... Bush.	215,684	5,809	457	468	656,473	302,481	83,481	436,683			
$	459,685	8,802	484	387	1,137,392	493,099	68,775	334,847	Free	Free	15c. per bush.
Wheat ... Bush.	55,274	2,576,495	2,393,007	815,913	2,315,410	46,178,494	11,668,477	9,811,383			
$	140,625	4,603,438	3,191,649	978,931	5,503,011	96,692,962	13,582,936	10,603,049	Free	35c. per bush.	30c. per bush.
Grain Products—											
Bran, shorts and middlings ... Cwt.	1,205	183,360	5,023	70,085	283,223	947,313	274,599	1,549,184			
$	3,054	214,072	9,143	102,977	641,828	1,475,578	279,672	1,788,944	10 p.c. or free	10 p.c. or free	15 p.c.
Wheat Flour ... Brl.	8,114	43,338	67,226	15,839	35,795	1,234,623	543,724	327,135			
$	98,806	302,203	450,465	103,303	417,353	12,058,339	3,369,241	1,967,044	Free	20 p.c.	78c. per cwt.
Meats—											
Bacon, hams, shoulders and sides ... Cwt.	430	286	402	106	7,503	2,598	975	999			
$	12,144	9,327	7,430	3,622	197,243	93,712	34,156	32,814	Free	25 p.c.	2c. per lb.
Cwt.	48,536	25,707	20,384	9,319	277,354	189,368	140,472	97,763			
Beef, fresh, chilled or frozen ... $	825,162	339,461	242,097	110,490	4,688,385	2,740,621	1,549,343	1,144,344	Free	2c. per lb.	3c. per lb.

Mutton and lamb, fresh, chilled or frozen	Cwt.	1,140	270	887	334	44,319	40,904	56,776	12,432			
	$	23,957	4,831	15,920	6,613	980,644	1,041,318	960,368	300,917	Free	2c. per lb.	(d)
Pork, fresh, chilled or frozen	Cwt.	2,276	267	437	233	8,364	5,538	5,826	5,094			
	$	63,795	10,723	8,525	8,582	121,492	204,711	140,787	143,582	Free	2c. per lb.	¾c. per lb.
Pork, dry-salted and pickled	Cwt.	28				3,581	622	331	5			
	$	644				88,065	9,795	1,917	99	Free	25 p.c.	2c. per lb.
Poultry, dressed or undressed	$	7,132	644	5,050	6,040	120,855	478,714	700,005	563,797	2c. per lb.	2c. per lb.	2c. per lb.
Other meats, including canned meats, but excluding extracts	Cwt.	5,691	2,426	1,951	2,156	24,930	14,902	8,453	9,741			
	$	90,260	33,785	26,673	39,375	373,889	248,084	108,823	169,499	Free	25 p.c.	20 p.c.
Milk and milk products—												
Butter	Lb.	326,759	22,399	18,040	343,242	7,799,000	1,566,603	2,644,202	2,839,211			
	$	185,809	5,599	3,397	115,199	4,428,038	763,040	960,715	1,130,811	2½c. per lb.	6c. per lb.	8c. per lb.
Cheese	Lb.	4,547	13,589	325,400	1,117	3,550,449	293,028	3,537,682	1,980,247			
	$	2,044	4,448	46,893	19,691	940,453	82,991	543,503	393,448	20 p.c.	23 p.c.	(e)
Cream	Gal.	81,526	128,249	146,505	229,151	382,814	562,791	953,398	889,164			
	$	116,802	185,327	218,554	378,787	602,738	881,027	1,400,064	1,637,452	Free	5c. per gal.	20c. per gal.
Milk, fresh	Gal.	86,604	130,433	45,905	124,188	1,199,425	715,230	718,367	635,860			
	$	22,022	30,075	9,591	28,304	263,840	205,333	166,931	146,951	Free	2c. per gal.	2½c. per gal.
Milk, condensed, including milk powder	Lb.	1,321,910	2,702,167	444,600	276,000	7,182,048	9,548,723	532,857	5,761,387			
	$	207,384	441,057	47,634	42,336	1,185,335	1,629,042	64,518	726,517	Free	2c. per lb.	1c.—1½c. lb.
Seeds—												
Clover seed, alsike	Bush.	1,120	1,792	2,936	500	81,798	69,864	94,795	38,604			
	$	30,631	17,471	26,644	3,675	2,145,574	794,981	859,754	264,817	Free	Free	4c. per lb.
Clover seed, alfalfa and red	Bush.	11	9	500	73	2,832	2,121	7,201	15,347			
	$	172	241	6,060	1,651	79,224	22,551	74,201	72,102	Free	Free	4c. per lb.
Clover seed, other	Bush.	359	14,801	5,803	1,510	46,221	95,109	56,915	76,553			
	$	4,718	53,902	23,499	7,107	801,220	379,505	231,890	375,879	Free	Free	(f)
Flaxseed	Bush.	6	867,857	481,915	254,237	453,084	1,739,517	1,919,776	2,063,178			
	$	60	1,325,587	1,196,685	647,824	2,196,986	3,133,453	3,888,568	4,533,692	20c. per bush.	30c. per bush.	40c. per bush.
Grass seed	Bush.	2,398	9,267	73	4,000	32,115	89,001	66,071	57,083			
	$	4,662	25,483	332	7,896	105,015	189,092	269,999	109,949	Free	Free	2c. per lb.
Vegetables—												
Potatoes	Bush.	918,175	153,073	225,615	76,038	5,559,165	2,214,288	1,604,675	439,935			
	$	3,040,745	44,572	106,364	55,099	10,899,860	1,616,628	1,058,846	326,967	Free	25c. per bush.	50c. per cwt.
Sugar beets	Ton					7,723	11,502	10,481	11,430			
	$					70,235	103,175	63,151	56,730	5 p.c.	5 p.c.	80c. per ton
Turnips	Bush.	8,678	8,265	4,148	10,737	1,971,951	1,649,293	1,575,880	1,934,687			
	$	4,580	2,315	1,719	3,727	898,589	296,973	429,676	284,464	15 p.c.	15 p.c.	12c. per cwt.
Miscellaneous Products—												
Eggs	Doz.	5,665	8,152	3,490	239	87,208	150,322	117,649	71,499			
	$	2,451	2,315	1,030	80	52,931	92,859	55,298	30,394	Free	Free	8c. per doz.
Hay	Ton	20,314	4,021	105	4,328	148,698	60,603	1,489	24,176			
	$	459,348	73,286	2,118	47,287	2,761,059	1,304,653	32,751	263,358	$2 per ton	$2 per ton	$4 per ton
Maple sugar	Lb.	792,421	8,759	298,190	150,916	1,729,156	1,237,308	1,755,816	299,478			
	$	213,422	1,697	42,796	27,133	482,368	288,867	155,783	61,250	3c. per lb.	3c. per lb.	4c. per lb.
Tallow	Cwt.	393		708	1,596	18,172	10,955	11,800	13,014			
	$	5,053		4,422	12,631	283,761	71,222	64,417	102,507	Free	Free	½c. per lb.
Wool	Lb.	76,680	219,169	54,080	89,086	2,977,111	6,188,116	365,134	4,796,520			
	$	40,701	43,321	8,153	30,733	1,826,928	1,531,803	57,517	1,503,069	Free	(g)	(g)
Total value of above commodities	$	8,543,245	8,604,898	5,858,262	3,036,313	81,049,860	147,450,713	37,966,159	35,047,101			

(a) Cattle weighing less than 1,050 pounds, 1½c. per lb.; 1,050 pounds or over, 2c. per lb. (b) Horses valued at not more than $150 each, $30 per head; more than $150 each, 10 per cent. (c) Sheep, one year old or over, $2 per head; less than one year old, $1 per head. (d) Mutton fresh, 2½c. per lb.; lamb, fresh, 4c. per lb. (e) Cheese, 5c. per lb. but not less than 25 per cent. (f) Clover seed, crimson, 1c. per lb.; white, 3c. per lb. and other, 2c. per lb. (g) Dutiable various rates. See **Commercial Intelligence Journal** No. 974, Sept. 30, 1922, pages 516-7.

CONDITION OF THE CHINESE WHEAT CROP

J. W. ROSS, TRADE COMMISSIONER

Shanghai, May 23, 1923.—Reports from the wheat growing districts north of the Yangtze river indicate that while in certain parts of the country the crop is much better than last year, the prospects for the greater portion of the area are not bright. A crop of more than 60 per cent that of a normal year cannot be looked for. The wheat crop of China is all winter wheat, as the land is seeded in the autumn and harvesting takes place in the latter part of June. The new wheat should be on the market early in July.

In the districts bordering on the Yangtze river, from Shanghai to Nanking (200 miles), where there is an abundance of canals and creeks and irrigation is practised, the crop is excellent and a full yield is probable. These districts comprise only a small portion of the wheat growing territory. In other parts, however, owing to the absence of rain during the autumn, less wheat was planted and the crop will be light.

There should be an excellent opportunity for Canadian flour in China this year, quite as good or better than was the case last year, providing exporters are in a position to deliver at the prices prevailing in 1922.

THE MARKETS OF BRITISH MALAYA

BY P. W. WARD

[*The subjoined is from an extended report on British Malaya which has been prepared by the late Canadian Trade Commissioner in Singapore. It is intended to publish in the* Commercial Intelligence Journal *that section of it which deals with the import trade opportunities for Canadian firms in these territories, and the completed work—which will include the sections that are now being published serially—will later be issued as a pamphlet.*]

I

Purchases by Tender and Indent

As quite a proportion of the imports of British Malaya are purchased by tender and indent, some idea may be given as to the systems followed and the conditions governing the sale of oversea products under them.

In former days, generally speaking, the system of supply in connection with public tenders was one of comparative simplicity, involving little or no outlay in the working of business. If the product was right, then it was only the question of a competitive price. At present, however, the keen competition existing between international sources of supply places this method of purchase on a different footing, and organized efforts, embracing the consuming end as well as the end actually placing the business, are necessary. The indent system likewise calls for good salesmanship at the point where the indent is made up and a tactful and energetic watching in London or New York with the head office or confirming house which actually orders the goods. There have been numerous instances brought to the notice of Trade Commissioners where an article supplied by a certain factory had been indented for at the end which handles the goods, but " switched " to another house (which had done nothing whatever to warrant an order) at the buying end. One case related to the writer by the manager of a house of very substantial proportions was that an article of proven selling value which he had indented for had been substituted by the London house by an article he " could not give away." For this reason, and also for the fact that it is both necessary and good policy to be in touch with head offices and confirming houses of Middle East importers, especially in regard to details of shipping and payment, it is suggested that any Canadian exporters planning to sell indent lines in British Malaya should have connections in London, New York, and (if possible) Amsterdam; or make arrange-

ments with correspondents in these cities capable of watching their interests. The writer's experience of business in a number of countries has led him to the adoption of certain maxims in regard to export efforts. These are as follows:—

(1) Do not attempt to do business in any market unless you are measurably sure of success.

(2) Having decided on a sales campaign in an overseas market, do not get into touch with potential buyers of your product until you have first learned "what to do" and "what not to do." Many chances of good business are killed by a thoughtless first letter.

(3) No product is so good that it has not a competitor. Competition is international in scope. The cheaper production or lower freight rates of a competitor may place you at a disadvantage. Grasp *all* the conditions before you offer your product.

(4) Make your quotations in the currency of your potential customers—c.i.f. That is the way you like to buy.

(5) A good product is frequently damned by bad packing. Good packing may cost you a little more, but your competitors are all in the same boat.

(6) Export business needs as keen organization as home trade. The up-to-the-minute exporter is the one who gets results.

These maxims have been referred to in the present chapter chiefly for the reason that sales in connection with tenders and indents require organized effort, a thorough knowledge of conditions, and a definite co-operation between the various selling units involved. If the salesman overseas fails to advise his confrères at the head office or confirming house, his efforts to secure an order may be thrown away. The same result takes place if the agent in London or New York fails to live up to his part of the agreement. If the exporter at home fails to fulfil all the conditions of an order as to price, delivery and other features, then the salesman's first order will almost invariably be his last. The necessity for complete organizations is a vital one, and its absence has in many instances meant the loss of good business for a good product.

GOVERNMENT PURCHASES

The Governments of the Straits Settlements and Federated Malay States purchase the bulk of their requirements through the office of the Crown Agents for the Colonies in London. Indents are made up by each department of government in January and February of each year and passed on to the secretariat, where they are checked over as to amounts; these must, of course, fall within the figures of the annual estimates. Other than this particular, the secretariats give no supervision to the indents, nor dictate in any way to the departments as to what, or how much, they shall purchase.

Government buying is therefore annual; the indents go forward to the Crown Agents during the month of March, and are undoubtedly consolidated by the latter in the case of many articles. Buying by the Crown Agents is largely by tender, and even in the case of small quantities of various articles competitive prices are obtained.

It will be readily seen that representation in London is necessary before this market of demand can be approached; the extent of the demand for many articles is so large, however, that the strongest efforts to "get on the list" will be worth while. It is of course realized that, in many cases, particular brands or makes of articles will be asked for by the departments responsible for the various indents, and that such requests will frequently be the result of salesmanship at the overseas office. This means that representation is necessary in British Malaya. The battle is more than half won if the indentor can be persuaded to specify a particular brand or manufacture.

The organization of the Crown Agents for the Colonies has been built up during a number of years and is a somewhat extensive institution at the present time. In the earlier days of British colonization the larger proportion of imported articles was brought from the United Kingdom, and a purchasing body became necessary. Conditions have changed to a great extent in certain of the Crown Colonies in recent years, and more than one of these would welcome the opportunity of making its own purchases direct. There is not, however, any likelihood of a change in policy for some little time to come, and the goodwill of the Crown Agents will have to be courted by any export house desirous of supplying colonial requirements. The system has certain advantages for both seller and consumer, and once a connection is established some very good business may be obtained.

GOVERNMENT FOODSTUFFS DEMANDS

So far as British Malaya is concerned, the circumstances are such that foodstuff purchases are almost wholly made by local tender. This is done not only for purposes of inspection and economy, but also to ensure that local merchants receive a definite share of Government business. Fairly large purchases of foodstuffs are made for the hospitals, insane asylums, prisons, etc. There are, of course, a number of foodstuffs on which Western nations cannot hope to quote, but on such items as canned milk, canned fish, and canned fruit Canadian exporters represented in British Malaya should be able to secure a portion of the demand.

RAILWAY SUPPLIES

The Federated Malay States Railways which, besides extending through these states, also touch the chief centres of the Straits Settlements and Unfederated Malay States, are Government owned and purchase all supplies of a major nature through the Crown Agents in London. A very ambitious programme has been in prospect, but the economic conditions of the past two years have made it necessary to almost wholly defer new construction and other items for the present.

For the next few months very little buying will be done; even maintenance stores will be kept at as low a margin as possible; but as soon as conditions begin to mend, tenders for locomotives, rolling-stock, bridge materials, rails and various supplies will be issued. Houses catering for the Canadian railway systems should be in a position to quote definitely on various requirements of the Federated Malay States Railways. During 1918-19, when United Kingdom manufacturers were unable to supply, the railway system in question purchased several million dollars' worth of materials in Canada, and an extreme goodwill exists for Dominion manufacturers.

The administration of the railway is essentially British, and the policy is rather to buy from Great Britain whenever possible. There have, however, been substantial purchases from the United States, Australia, and Canada. A number of freight cars have recently been supplied by a Canadian plant. The Malayan peninsula is rich in timber, and none has been imported for railway use up to the present. There is under consideration, however, the question of laying creosoted hardwood sleepers on certain portions of the track, and one enterprising Canadian lumber house has sent out a sample shipment for trial purposes free of all charge.

During 1921 maintenance stores and materials were purchased by this railway system to the value of $9,913,982, while the expenditure on construction and surveys of new lines reached a total of $21,939,285. Out of the latter amount the sum of $14,047,588 was for stores and materials; $12,032,424 represented purchases through the Crown Agents. Construction stores are always

kept on hand to the value of about half a million dollars. The average value of indents sent to the Crown Agents by the Stores Department during 1921 was $140,000, ninety-five of such indents having been sent. The year in question covered a period of rigid retrenchment, so that with a programme such as the Federated Malay States Railways has in view, normal purchases would run to much heavier figures.

The following are some representative purchases during the year 1921:—

Twenty "L" class locomotives (from North British Locomotive Works, Glasgow).

Ten "R" class locomotives (from Baldwin Locomotive Works, Philadelphia).

One hundred and sixty covered goods wagons (erected at Port Swettenham; supplied from England).

A number of engine water tanks and columns.

Two 60-ton and one 20-ton weighbridges.

One turntable.

Electric light plant—One engine, generator, boiler and switchboard, one turbine pump and motor.

Machine shop—One wheel lathe, one Loudon lathe, one slotting machine, one 3-inch screwing machine, two drilling machines.

Erecting shop—One hydraulic press.

Smithshop—Two bolt machines, one oil furnace.

Carriage shop—Six paint-mixing machines, three overhead cranes.

Saw-mill—One sandpapering machine, one blind style mortising machine, one band saw sharpening machine, one lap point machine.

Ways and Works Department—Three radial drilling machines, one drill girder, one saw sharpener, one bolt threading machine, 32 miles of wire fencing.

Permanent way renewals were responsible for 908 rails, 126 points, and 166 crossings. Replacements on locomotives totalled $37,674 in value and on wagons $175,979. Purchases from Canada during 1921 reached a total value of $24,947, while Australia is credited with $29,943.

The railway is constructing its own passenger equipment, and last year built and placed in service one bogie sleeping car, two bogie first and second class composite cars, two bogie third class and two bogie third class and brake van composite cars. Twenty mail type bogie passenger cars were also under erection. A number of bogie sleeper wagons, coal trucks and low-sides were constructed as well. The system has its own tailoring, upholstering and bedding shops.

The construction programme includes a new terminus, yards and quarters at Singapore, with the doubling of the line on Singapore Island for a distance of fifteen miles; the doubling of the line also from Kuala Lumpur to Port Swettenham—a distance of about thirty miles, with a number of bridges and culverts; also from Kuala Lumpur to Batu Junction, nine miles; and a five-mile deviation at Kuala Kubu. A new water supply scheme for Prai and Bukit Mertajam, calling for miles of piping, is in progress.

Such machinery as concrete mixers, stone crushers, pneumatic drills, cranes, pumps, winding engines, etc., will be in demand from time to time.

Large works are in progress at Prai, the terminus for the port of Penang, and a town-planning scheme has been prepared for the first-named place.

Representation in Singapore—or better still, Kuala Lumpur—is necessary if a special bid for railway business is to be made. Certain day-to-day requirements are purchased locally, and on occasions these run to a substantial figure.

PRINTING AND STATIONERY

The Department of the Government Printer, both at Singapore and Kuala Lumpur, is one of interest to certain manufacturers in Canada, the paper requirements alone being of a substantial annual value.

Through the courtesy of the Government Printer at Singapore, the writer has gained certain information and samples which will enable Canadian paper

manufacturers to intelligently quote on these requirements. These requirements embrace 28-pound to 120-pound hand-made; 18-pound to 120-pound azure laid; 15-pound and 21-pound manifest bank cream wove; 48-pound and 56-pound white printing paper; 39-pound pamphlet cover paper; 30-pound, 36-pound and 60-pound blue wove; 24-pound to 130-pound blue laid; 36-pound to 56-pound cream laid; 116-pound brown and brown stereo paper; and various weights of vellum wove, cream wove, glazed cream wove, glazed imitation parchment, stereo paper, rough onion skin, art cover paper and kraft. At the present time practically the whole of the supply is from United Kingdom manufacturers.

PUBLIC WORKS

In a growing territory like British Malaya it will be readily realized that a number of public works are frequently going forward. Occasionally these are open to international tender—the Johore Causeway and Prai Wharfage are recent examples; but in the larger number of cases the contracts are secured by local firms. An example of the latter is the new Government hospital at Singapore, the preliminary portion of which is, at the present moment, being tendered for. Work of this kind calls for a variety of articles, from derricks to wire nails, and large quantities of certain materials are in request. Such contracts afford excellent opportunities for the local representation of Canadian manufacturers of building and hardware lines.

It would not, of course, be good policy for factory representatives to tender directly for any of these supplies. This should be done through a local house in touch with, and acceptable to, the various Government departments, the procedure being, in fact, exactly similar to that existing in Canada.

During the next few years, with the possibility of a largely augmented Government revenue, a number of extensive public works will be proceeded with.

STATE GOVERNMENTS

The local governments of the various states in the Malayan Peninsula have quite extensive Public Works Departments, whose annual expenditure runs into substantial yearly figures. One of the chief items in their various programmes is the construction of roads, and purchases for this particular class of work are constantly being made. Water schemes, involving pumping plants, piping, etc., are increasingly being promoted, while electric lighting schemes, with the various purchases that these call for, are being considered in a number of communities.

In this connection it is necessary to keep closely in touch with the Public Works engineers of each state and have illustrated literature, specifications and approximate prices presented. In the case of these parties also, it is distinctly desirable that local representation should be arranged: a good agent can go a long way towards lining up an order. All the smaller contracts are placed locally.

STATE OF NORTH BORNEO

As may be surmised, a large proportion of the purchases for Government are made through the offices of the Court of Directors in London. During the next few years, if revenues allow, a somewhat ambitious programme of public works will be proceeded with. During 1921, capital expenditure by Government included $742,000 for works, buildings and roads, and $164,000 for railways. Substantial purchases are also recorded for radio-telegraph and telephone materials. A water supply scheme for Sandakan is about to be embarked upon.

MUNICIPALITIES

The municipalities of Singapore, Penang, and Malacca, in the Straits Settlements, are directly under Government administration but are given a certain amount of latitude in organization matters. Their purchases are not made through the Crown Agents but by direct tender, issued locally, with the exception of very large requirements. In the case of Singapore the latter are purchased through an agent in Glasgow, who issues tenders throughout the United Kingdom and on which any Canadian house having representation in Great Britain can compete, provided a satisfactory method of inspection can be agreed upon.

The yearly indent for municipal stores for Singapore is in the neighbourhood of a million dollars; the amounts for Penang and Malacca are considerably less, but certainly of consequence. These stores comprise such items as engineers' and plumbers' stores, tools, paints, etc., among imported lines. Tenders are called once a year only for these purchases, generally a few weeks after the new year.

The municipal requirements of Singapore should be very interesting to a number of Canadian houses in the next two or three years. A new water scheme requiring over fifty miles of large water mains, and the equipment for mechanical filtration plants, pumping station, etc., will shortly be proceeded with. At the moment it has not been definitely decided whether steel, wrought iron, or concrete piping will be employed. A particular form of concrete piping is under test over a four-mile course, but the consulting engineer is under the impression that steel pipes will have to be employed.

Another project of the immediate future is the extension of electric power equipment of the Singapore Tramways Company, a large part of which is leased to the municipality. The original plant was manufactured by a well-known English firm, but it is quite possible that the additional plant will be subject to open tender. During the next few months it is also possible that the municipality of Singapore will embark upon a housing scheme estimated at a cost of over $1,000,000.

The municipality of Penang is a very enterprising one, and public works of a nature akin to those of Singapore are projected, although involving less expenditure.

In the Federated Malay States, the capital of Kuala Lumpur and the towns of Ipoh, Taiping, Seremban, etc., are open to certain development in public facilities in the near future.

HARBOUR BOARDS

The Harbour Boards of Singapore and Penang send large indents to the Crown Agents in London each year, the indents for regular supplies going forward generally in March and September.

The Singapore Harbour Board is a very extensive organization, with property valued at nearly $30,000,000, and comprises an up-to-date dockyard as well as extensive wharf accommodation and godowns. One of its leading features is an electric power plant, with a yearly capacity of nearly 2,000,000 units. During 1921, orders were placed for a 600-kw. turbo-generator and additional boiler and large unit transformers; also a 30-ton electric travelling crane. The dockyard workshops also imported a quantity of new machinery.

Large indents for stores and materials are sent forward to the Crown Agents, and a number of special items will possibly be asked for in the near future. The equipment in demand includes concrete reinforcement, pumping machinery, caissons, cranes, capstans, iron fencing, trestles and gates, yard locomotives, piping, manhole covers, motor trucks, electrical fittings and supplies.

The value of the half-yearly indents sent forward to the Crown Agents by the Penang Harbour Board runs from $35,000 to $60,000. The requirements of the board comprise all classes of material for shipbuilding and ship and shipyard repair. Lines in which certain Canadian exporters can compete are mild steel plates, from $\frac{1}{8}$ inch to $\frac{1}{2}$ inch; galvanized bars, $\frac{1}{4}$ inch up to $1\frac{1}{2}$ inch; and angle iron of various sizes. Small importations of lumber for piling, etc., are required from time to time.

COMMERCIAL INDENTS

There are a number of departmental stores in the chief centres of British Malaya. Nearly all of these have their head offices in London, through whom at least the larger proportion of their buying is done. One or two, however, purchase direct. A certain number of proprietary and largely advertised lines are imported from the United States, generally through New York confirming houses. Indents are sent forward by certain stores only at half-yearly intervals, others every three months, while some requisition monthly. Quite a number of the Chinese merchants in British Malaya also purchase through London, New York, San Francisco, and Hong Kong commission and confirming houses.

While it is, to some extent, unsatisfactory not to be able to carry a transaction through with the actual purchaser of the goods, the system has certain advantages for the manufacturer, and the labour and detail saved in regard to shipping comparatively small consignments is appreciable. The surety of prompt payment is also a consideration.

Canadian manufacturers having London representation will be amply repaid for carefully canvassing the confirming houses and head offices of Eastern importers. The names of a number of these, buying for British Malayan firms, are on file at the Department of Trade and Commerce, Ottawa, and may be obtained on application to the Director, Commercial Intelligence Service.

During the past few months there has been a holding back of indents, while stocks accumulated through the days of depression were worked off. The situation is now changing and some indents—although perhaps less in value than at normal times—are going forward. The trend in this direction will be fairly steady from now on.

LIST OF PUBLIC WORKS ENGINEERS

In order that manufacturers of lines suitable for public works of various descriptions may be able to get into touch with the responsible officials in British Malaya, a list giving the names and addresses of the executive engineers of the Straits Settlements and Federated Malay States Governments, the Governments of the Unfederated Malay States, the railways, municipalities, harbour boards, etc., has been forwarded to the Director, Commercial Intelligence Service, Department of Trade and Commerce, Ottawa, and is available to any interested Canadian manufacturer.

FOURTH INTERNATIONAL NETHERLANDS INDIES INDUSTRIES FAIR

The Fourth International Netherlands Indies Industries Fair is to be held at Bandoeng, Java, from July 28 to August 12 next. All goods exported from abroad will be admitted for the exhibition without any restriction as to their origin. A prospectus of the fair with form of application is on file at the Department of Trade and Commerce, Ottawa, and is available on application.

INCREASED DANISH PRODUCTION OF PIGS AND BACON

Trade Commissioner Harrison Watson

London, June 6, 1923.—The British Ministry of Agriculture is advised that the record number of 1,003,000 pigs were slaughtered in Denmark during the first four months of 1923, and it is considered probable that the total killing during the current year will reach 3,000,000, the highest previously recorded being 2,500,000 in 1914.

Quite recently, the number of pigs slaughtered has averaged from 62,000 to 65,000 weekly, compared with 40,000 to 45,000 last year, but the market of the United Kingdom has been able to absorb the increase, and prices of bacon have moreover remained firm.

Regarding complaints made a few months ago as to the fat quality of Danish bacon—which received some publicity in Canada—it is stated that this has now ceased and recent supplies have been so lean that buyers are offering a higher price for a somewhat fatter quality.

Denmark continues to hold the first place in this market among imported bacons, the only serious rival being the new accession to these ranks, Ireland, but it is reported that up to the middle of April, the number of pigs slaughtered in Ireland amounted to only about 250,000, a falling-away of about 33 per cent as compared with the two previous years.

FIRST STORE CATTLE IN BIRKENHEAD

Trade Commissioner J. Forsyth Smith

Liverpool June 1, 1922.—The arrival in Birkenhead on May 31 of the first shipment of 528 Canadian store cattle (ex ss. *Welshman*) was celebrated at the landing by the attendance of the mayor of Birkenhead, town councillors, Dock Board officials, cattle dealers, and others interested. This first consignment was brought over by the Canadian Cattle Corporation, Limited, of London, under a scheme devised to meet the requirements of English farmers. The cattle were sent forward, after the necessary ten hours' detention at Birkenhead, to the corporation and farms at Worlingham, in Suffolk, to be fattened for six weeks before being sold for slaughter. The scheme, however, contemplates that future shipments shall be sold to farmers in East Anglia within a week or so of arrival, the farmer being given the opportunity of buying them on the deferred payment system, under which they will pay a 10 per cent deposit on purchase, remove the animals to their own land for fattening, and pay the balance of the purchase price to the corporation when they are finally sold. It is believed that the scheme will appeal to farmers generally, and will lead to a considerably increased demand and to more rapid absorption of supplies. The animals were in fine condition, and have made a satisfactory impression on the trade. In addition to the animals brought over by the Canadian Cattle Corporation, Limited, a number were also received for immediate sale in Birkenhead. Large supplies are also due in the near future.

LIVERPOOL'S INTEREST IN CATTLE

The Stanley Cattle Market at Liverpool has not been in operation since 1912, and has handled no Canadian cattle since the imposition of the embargo which required the slaughter to take place immediately at the place of landing. The removal of the embargo, however, and the interest it has lent to the cattle

trade, has led to the authorities taking vigorous action to restore the facilities of this important Mersey market. Necessary alterations have been made to provide adequate facilities, and arrangements are now complete for the holding of the first cattle auction at the Stanley Market next week, when a number of Canadian store cattle due ex ss. *Caledonian* will be offered for sale. It is expected that in the future Liverpool will secure a large share of this business.

SITUATION OF THE STRAWBERRY AND RASPBERRY PULP MARKET IN GREAT BRITAIN

Trade Commissioner J. Forsyth Smith

Liverpool, June 4, 1923.—At the request of British Columbia strawberry and raspberry shippers, inquiry has been made, with the co-operation of the Trade Commissioners, as to the prospects for the sale of frozen raspberries and strawberries to jam manufacturers in the United Kingdom.

Considerable interest has been manifested in the proposition, and undoubtedly a market could be developed for certain quantities. The extent of the demand, however, would depend primarily on the English crop of these berries. If there were a crop shortage, there would be a large demand, but if English berries were plentiful, these would get the preference, and even in the off season considerable quantities stored as pulp would be available to keep the factories going. If there were only an average crop, English fruit would supply all the demand till October, when there would be a call for imported pulps. It is too early to give any satisfactory indication as to English crop prospects. All that can be said is that the strawberry bloom has been good, and promises a larger crop than last year, though spring frosts and a prolonged period of cold weather may change this outlook. Raspberries are promising, but are more likely to have suffered from weather conditions, and a smaller crop than last year is anticipated.

The situation is also likely to be affected by the fact that the commercial depression during the past year has had an adverse effect on the demand for jam, which to a considerable proportion of the consuming public has been somewhat of a luxury, so that there is a considerable hold-over stock. The high price of sugar is also expected to have an adverse effect on the total output of jam this season.

Jam manufacturers have for many years been using berry pulps imported from Holland, France, and Australia. These are shipped in air-tight tins, which have definitely established themselves upon the market and are regarded as satisfactory by the manufacturers. Frozen berries are not generally known, and, although the experience of British Columbia in shipping these to eastern Canadian jam manufacturers has demonstrated the value of the freezing process, there is a certain amount of prejudice against the frozen product that will have to be overcome before business can be done. The expense also of keeping the fruit in cold storage till required adds to the difficulty of competition with pulps put up in sterilized tins, which will keep for months in ordinary storage. No new product of this nature will be bought in commercial quantities till samples have been tested out by the jam manufacturers. While there is no difficulty in arranging for the transportation under refrigeration of large quantities, it would probably prove difficult to secure cold storage in transit for the sample lots, which would therefore not be likely to offer a fair test. On the whole, therefore, shippers are advised, if at all possible, to fall into line with their competitors, put up the berries in air-tight tins, and arrange for the distribution through brokers at British ports of trial consignments during the

summer months. If these trial consignments prove satisfactory it should be possible to place orders during the months of October and November and later, and this business may run into several hundred tons. Direct selling arrangements with the jam manufacturers are not feasible. The brokers should be furnished with c.i.f. quotations, as quotations f.o.b. shipping points are useless. Brokers will represent the shippers for a commission of 2 to 3 per cent.

Although the offer of pulp in sterilized tins is recommended as most likely to lead to ready sales, many manufacturers have expressed unwillingness to try out the products of the frozen process. It is possible that actual demonstration may convince them that, as claimed, the berries do not lose either colour, shape or flavour in the process, and will lead to definite business. In this connection it may be stated that one of the largest caterers in the United Kingdom has had some experience with frozen berries, and has asked for quotations on some 22 tons of strawberries. Cold storage can be procured for 20s. per ton for the first twenty-eight days and 6s. 3d. per ton per week thereafter.

As to prices, it is impossible to forecast these until the British crop situation is definitely known. Dutch raspberry pulp is now quoted at 41s. 6d. to 45s. 6d. per case of 110 pounds; French raspberry pulp (superior quality) at 65s. per cwt.; and Dutch strawberry pulp at 32s. 6d. to 65s. per cwt. (112 pounds) according to grade and quality. Last year English raspberries were offered at 60s. to 70s. per cwt., and on account of the large crop dropped to as low as 25s., while strawberries opened at 58s. to 60s. per cwt. and dropped to 35s.

With regard to package, the shippers offer 40-gallon barrels or 4-gallon tins. Undoubtedly the 4-gallon tins would be generally preferable, though some interest has been expressed in the larger package. The continental pulp comes in cases containing ten 5-kilogramme tins, and the Australian pulps in 56-pound tins.

GROWING DEMAND FOR KRAFT PAPERS IN INDIA

Trade Commissioner H. A. Chisholm

Calcutta, May 15, 1923.—Paper merchants in Bombay, Calcutta and Delhi report a growing demand for kraft and wrapping papers throughout the country. There are two distinct features to this demand—the Bombay cotton mill market and the general bazaar trade.

The Cotton Mill Trade.—On the Bombay side there has in recent years been a rapid development in the Indian textile industry and the mills there are maintaining a large production of cotton piecegoods. It is in connection with the wrapping of the finished webs of cloth that this market for kraft paper arises. There is nothing special in the quality or weight of papers used by the cotton mill trade, and requirements are easily filled from stocks normally carried by large paper merchants.

The Bazaar Trade.—Until very recently a visitor to the average Indian foodstuffs bazaar would have seen the bazaar merchant squatting cross-legged among his little conical piles of flour, pulse, gram, etc., weighing out a few pounds of his wares on his ancient scales and wrapping up each purchase with bits of old papers and grass. To-day a visit to the same bazaar reveals the dealer squatting and weighing out bits of flour and pulse in the same old way, but now the small purchaser may receive his flour in brown paper bags much as the Canadian housewife receives a few pounds of sugar or rice from her grocer. To be sure, not every bazaar merchant takes such pains for the convenience of his customers, but in many of the largest centres the brown paper

bag has become almost an established custom. In this trade, only the cheaper grades of wrapping papers are employed. Cheapness is the first essential, as price is the sole consideration when the Indian bazaar merchant buys paper bags.

Increasing Imports.—The volume of wrapping paper imported during the twelve months ending March, 1923, increased 50 per cent as compared with the previous twelve months to a total of 156,000 cwts.—an amount equal to that imported during the entire three-year period 1917-1920 and slightly in excess of the volume imported during the import boom year 1920-21. A feature of last year's trade was the increase in imports of American wrapping paper. According to Indian official Customs returns, imports during the last three years have been as follows:—

	Twelve Months, April 1 to March 31		
	1920-21	1921-22	1922-23
Packing Paper—	Cwts.	Cwts.	Cwts.
From United Kingdom	49,915	66,144	58,927
From Sweden	13,382	10,630	16,596
From Norway	30,718	3,349	11,994
From United States of America	33,695	3,369	23,203
From other countries	27,027	24,965	45,280
Total	154,737	108,457	156,000

COMMERCIAL NOTES FROM NEW SOUTH WALES

COMMERCIAL AGENT B. MILLIN

Sydney Wool Sales

Sydney, May 23, 1923.—The auction sales which concluded on the 18th April were in every way a fitting termination to what must be regarded as the most uniformly successful selling period in the history of the Sydney wool trade. The closing series was a remarkable one, inasmuch as prices have moved steadily in growers' favour, and each day revealed a firmer market, culminating in ideal selling conditions from a producer's point of view.

Opening rates of the last series showed a rise of 5 per cent on the March level, which was increased to fully 10 per cent before the close despite the fact that the catalogues were largely of an end-of-the-season character, and whilst including some nice lines of autumn shorn wools also comprised the usual big proportion of clearing-up lots. As a matter of fact the closing level of values very closely approximated the highest point of the season which was touched in January last.

The same extreme prices may not have been forthcoming for super wools, but considering the difference in the condition of the wools offering, 32 pence per pound to-day is a really splendid figure, and it was reached upon more than one occasion, whilst frequent sales were made from 30 pence upwards. Buyers' limits appeared to be quite as high as at any point of the season. The continental section was more active than has been the case for some time past, French buyers being particularly prominent, and there was also good support from Belgium, Italy and Germany. The Japanese section continued keen, Yorkshire was operating on a larger scale than for some time past, and American buyers were also purchasing freely.

Destinations of Wool Purchased at the Sydney Sales

The quantity of wool shipped from Sydney during the first nine months of the current season totalled 809,491 bales valued at £19,561,306. Following are details of the various destinations of wool shipped together with the value:—

Destination	Bales	Value
United Kingdom	318,172	£7,002,215
France	188,564	3,874,004
Japan	89,515	3,197,317
United States	59,849	1,774,600
Belgium	55,908	1,094,932
Germany	55,759	1,466,704
Italy	34,600	913,868
Netherlands	3,320	85,897
Canada	1,988	94,533
Sweden	546	19,998
New Zealand	542	17,938
China	409	10,727
Other countries	319	8,573
Totals	809,491	£19,561,306

Centenary, Royal Agricultural Show, Sydney

In spite of the very dry conditions ruling throughout the state during the last six months, the exhibits at the Royal Agricultural show at Sydney showed a very appreciable improvement both in quality and quantity, and the demand for exhibition space was so large that it was found to be inadequate, so much so that the society has decided to make very considerable extensions during the coming twelve months.

The annual show was originally started in a small way for the exhibition of purely pastoral and agricultural products, but it is now generally recognized as one of the best mediums for bringing under public notice all descriptions of manufactures and machinery. The exhibits in the motor car section bore witness to the remarkable advances made by this industry, and all the best-known makes from all parts of the world were well represented. Special prominence was given to the exhibition of cotton grown in Australia and the products therefrom. Generally speaking, nothing equal to this year's display has ever before been seen in the Commonwealth, and the exhibition demonstrated fully the wonderful fruitfulness of Australia.

New Woollen Mills in Australia

Prompted by the success of the mills already established in Australia, enterprise is being displayed in the formation of new textile companies and the erection of new factories.

The success of the old-established mills was largely helped during the war period by the strong demand experienced for local woollen goods, and for some two or three years every yard of material turned out locally found eager purchasers. Heavy shipments of woollens made to Australia when the slump occurred in tweeds manufactured abroad from wools purchased before the present period of high prices have greatly affected the demand for Australian tweeds. But this is doubtless temporary, and if wool prices dropped, Australian materials would show the lower cost more quickly.

The anticipated expansion in local woollen establishments has much justification, and if the quality of Australian woollens, hosiery, etc., is kept up to the mark, the local mills should make much progress. The quality of the tweeds and other manufactures turned out is excellent, but there is not the variety obtainable as in imported materials. In future, however, it would seem that Commonwealth factories will turn out a far greater proportion of the wants

of the country than they do at present. The latest returns available show that 6,350,500 yards of tweed and cloth were manufactured in a period of twelve months. The States of Victoria and New South Wales are chiefly responsible for this amount, the former producing 2,509,000 yards and the latter 2,494,417 yards.

Meat Trade of Australia

For the last few years the meat trade of Australia, as far as the export portion of the business is concerned, has seriously diminished. This is notably so in the export of beef. It is realized by the trade that there are great possibilities in the cultivation of an export trade to the East. With the object of opening up new markets, the Australian Meat Council has just arranged to send to the East two experts with a view to making necessary inquiries. They will go to Manila first, and thence to Hongkong, the various Chinese centres, and Japan. On the return journey they will visit Singapore, India, and Java. It is anticipated that they will be absent from six to nine months. Another expert recently departed for South Africa with a similar object in view.

Improvement in Building Trade in Sydney

The building trade of Sydney during the last twelve months has shown considerable improvement, not only in the residential areas, but in the city of Sydney itself. This improvement is reflected in the continually increasing cargoes of Douglas fir which have arrived lately, Sydney Harbour having resumed its wonted pre-war aspect in this respect. Unskilled labour is plentiful, but there is a great scarcity of skilled workmen.

MARKET CONDITIONS IN THE BRITISH WEST INDIES

Barbados

L. M. B. Meyers, Office of the Trade Commissioner

Barbados, June 6, 1923.—Trade conditions in Barbados appear to be in a prosperous condition if one may judge from the general business activity, the expanding revenues of the colony and the healthy balance in the treasury. While wholesale trade has been about normal, improved sales over those of last year are reported in the retail trade.

Provision Market.—Flour is in full supply in all grades, baker's being quoted at $4.75 to $4.85; extra at $4.20 to $4.50; and superfine at $3.50 to $3.75 per half bag of 98 pounds. The supply of grain is limited. Potatoes and onions are plentiful, the former being quoted at $2.35 per 160 pounds, and the latter at $2.62 per 100 pounds. There is a shortage of oats, but fresh arrival is expected. (Canadian white oats are being quoted at $4.80 per bag of 160 pounds.) Owing to the continued drought there is quite a shortage of fodder, and in consequence large quantities of hay are being imported. Shipments from Canada have been arriving by almost every steamer and are quoted at $42.50 per ton of 2,000 pounds. Dry and pickled fish is at hand in fair quantity, while for lumber and cooperage stuffs, the supply at present is ample.

At the time of writing the sugar market is quiet in sympathy with easier advices from consuming centres. The greater number of planters have closed down for the present season, some of whom have made record grindings. The quantity of sugar now remaining to be sold is not large and is being held in anticipation of an advance in price.

British Guiana

Conditions in this colony have generally improved during May. The advance in the price of sugar has been greatly appreciated, and it is hoped that prices will continue to keep up. A considerable quantity of sugar has been shipped to the United Kingdom during the past few months, and this has affected the volume of export trade with Canada. Canadian refiners appear however to be willing to pay the equivalent of the price offered by United Kingdom buyers, and the quantity of sugar booked for shipment to Canada during the present month is larger than it has been for some months past. The diamond industry still continues to be quite active.

Commodity Market.—Potatoes are scarce, demand is good and prices are firm, with a tendency to rise. Superfine grades of flour are also scarce, but there are fair stocks of extras. Prices of this article are somewhat on the fall. Onions are also scarce, the demand being moderate. Beef stocks are moderate, the demand being normal and prices somewhat on the fall. Biscuits are in good demand and prices are steady. Prices are rising in regard to rice. The fish market is well stocked in both English and Canadian pollock, and the demand is normal. The following are recent wholesale prices: potatoes, $6 per barrel; beef, $28 to $30 per barrel; onions, $7 to $8 per crate of 50 pounds; biscuits, $6 per barrel; rice, $7 per bag; fish (pollock), $32 to $34.

Dry Goods.—Cheap prints are selling well and stocks are low. For better class prints the demand is small and full stocks are on hand. Cheap white cottons are selling well, fair stocks are on hand, and prices are 10½, 11, and 14 cents per yard. For better class white cottons the demand is small, and large stocks are on hand. In regard to woollens and tweeds, stocks are fairly large, and the cheaper lines are somewhat in demand. Stocks of leather footwear are fair and the demand is normal. There is a good demand for rubber boots and shoes and prices are rising with stocks fairly low.

RECONSTRUCTION OF THE GERMAN MERCANTILE MARINE

Trade Commissioner L. D. Wilgress

Hamburg, May 30, 1923.—Canada with a per capita export trade greater than any other country except New Zealand has a direct interest in the development of the world's shipping. A review of the progress made in the rebuilding of the German mercantile marine may therefore be of value. Information on this subject is very difficult to obtain, the particulars available from German sources being limited, while those published abroad are largely based on conjecture. However, the present is a convenient time to present such facts as are available, since the German shipping companies have almost completed the preliminary programme for the reconstruction of their fleets.

PROGRESS ATTAINED

On the outbreak of the war the total tonnage sailing under the German flag amounted approximately to 5,100,000 tons, and the German mercantile marine ranked second after that of Great Britain. Of this total some 2,210,000 tons were seized during the war and a further 2,410,000 tons were delivered to the Allies after the conclusion of hostilities in accordance with the terms of the Peace Treaty. The Germans retained vessels of under 1,600 tons of a total tonnage of about 480,000 tons. The present tonnage of the German mercantile

marine is believed to be in the neighbourhood of 2,000,000 tons, so that by purchase and new construction the Germans have succeeded in attaining to about two-fifths of their pre-war shipping standard.

The *Nautical Gazette* recently published the following estimate of the American Bureau of Shipping for the figures of the German mercantile marine at the end of last year:—

	No.	Register Tons
Steamships	617	1,709,731
Motor ships	33	16,783
Sailing ships	200	87,200
Sailing ships with auxiliary power	18	4,844
Tugs	529	184,109
Lighters	570	173,302
	1,967	

If the above estimate is correct the total tonnage of steamships of German registry should soon exceed 2,000,000 tons.

PRELIMINARY DIFFICULTIES

For the first two years after the Armistice the rebuilding of the German mercantile marine was hampered by the uncertainty as to the carrying out of the shipping clauses of the Peace Treaty, and by the delay of the German Government in fixing the compensation due to the shipping companies for the confiscated vessels. With the shipping crisis in 1920 it became clear that the clause in the treaty requiring Germany to deliver 200,000 tons of shipping a year for five years would not further be enforced. In February, 1921, the German Government after length negotiations fixed the compensation due to the shipping companies at 12,000,000,000 marks. It was provided that only 10 per cent was to be spent on the purchase of ships abroad and the remainder was to be used for new construction in Germany. At the rate of 60 marks to the dollar current at that date, the above sum was equivalent to $200,000,000. The absence of sufficient German tonnage was proving a severe handicap to the trade of the country, so that with the settling of these questions the shipping companies commenced the active reconstruction of their fleets.

PURCHASE OF SHIPS

One of the methods by which the German shipping companies have recreated their fleets has been the purchase of vessels from foreign countries. The shipping crisis of 1920 gave the companies the opportunity of acquiring ships cheaply. Not only have foreign vessels been purchased, but the Germans have also bought back many of the former German ships which were delivered up to the Allies. During the twelve months commencing with July, 1921, German shipping companies purchased 130 ex-German ships of a total tonnage of 491,567 tons. The largest vessel bought was the *Cap Polonio,* built in 1914 (20,597 tons), which the Hamburg South American Steamship Company acquired again after unsuccessful efforts had been made to dispose of her to British interests. The next largest vessel bought back by the Germans was the *Graf Waldersee* (13,193 tons). Other large ex-German vessels acquired in this manner were the *Bahia Castillo* (9,949 tons), the *Yorck* (8,909 tons), and the *Seydlitz* (8,008 tons). Not in every case were the ships purchased by their former owners. The following table taken from the *Schiffahrt Jahrbuch* shows

the German steamship companies which participated in the purchase of ex-German vessels:—

	No.	Total Tonnage.
North German Lloyd	10	64,714
Hamburg-South American Steamship Company	9	64,525
Hamburg-America Line	12	58,178
Kosmos Line	6	33,226
Hugo Stinnes Lines	4	31,075
Woermann Line and German East Africa Line	7	23,882
Schroeder, Hoelcken & Fischer	9	20,132
H. Kayser & Son	4	17,488
Roland Line	2	10,707
Paulsen & Ivers	4	10,295
Fr. Laeisz	4	10,245
Emil R. Retzlaff	4	8,991
Hackfeldt & Fischer	4	7,812
Oldenburg-Portuguese Steamship Company	5	7,152
Hansa Line	2	6,505

Since last July further ships have been purchased abroad, including several vessels bought by the Hamburg-America Line, but the chief additions to the German mercantile marine have lately been through new construction.

NEW CONSTRUCTION

The German shipyards commenced actively to undertake the construction of new vessels in 1921. During that year there were completed 343 ships of a total tonnage of 409,000 tons, which of course includes vessels built on foreign account. During 1922 the number of ships completed was 648 of a total of 710,000 tons. At the end of 1922 there were 109 ships of a total of 416,081 tons under construction in German yards, of which 102,500 tons were being built for foreign account. On March 31, 1923, there were 73 vessels under construction of a total of 333,427 tons, as compared with 416,081 tons a year previously. Germany ranks second after Great Britain in the amount of shipping under construction at the present time.

LARGE VESSELS

Among the steamers which will be put into operation this year is the *Columbus* (32,000 gross register tons), being built for the North German Lloyd. This steamer will have accommodation for 928 first- and second-class and 1,000 third-class passengers and will be the largest German ship. Before the end of the year the two new Hamburg-America liners, the *Albert Ballin* and the *Deutschland*, of 22,000 tons each, will also be operating on the transatlantic route. With the *Cap Polonio* (20,597 tons), there will therefore be four German steamers of over 20,000 tons register in operation before the end of the year.

Other large German mail steamers which are nearing completion are the *München* (14,000 tons), the *Bremen* and *Stuttgart* (11,000 tons each), all belonging to the North German Lloyd. The Hamburg-America Line have recently received delivery of the *Thuringia* and *Westphalia*, sister ships of 11,600 tons each, of which the former is already and the latter soon will be running between Hamburg and New York. Other German steamers over 10,000 tons are the *Cap Norte* and the *Antonia Delfino* of the Hamburg South American Steamship Company and the *Hansa* of the Hamburg-America Line, all of which have been in operation for some months.

END OF ACTIVE CONSTRUCTION

The rebuilding of their fleets has already proceeded sufficiently far to enable the leading German shipping companies to maintain a fair proportion

of their pre-war services. During the past two years the shipping business has proved very satisfactory from the German point of view, since with building and operating costs mostly payable in marks the vessels have earned freights and passage fares in gold. It is, however, thought that with the completion of the present building programme towards the end of this year the companies will not undertake any further construction on a large scale. The costs of ship construction in Germany are no longer considerably below the level of other countries, while the state of the world's shipping and the slow development of Germany's foreign trade does not warrant extensive additions to the existing fleets. The end of the period of feverish activity in the German shipyards is therefore probably in sight.

LOW OPERATING EXPENSES

The German shipping companies still have the advantage of low operating costs, chiefly due to the low wages paid to the crews of vessels. It is stated that the captain of a British steamer receives a salary equivalent to the total wages of the crew of a German ship. During May the captain of a German mail steamer has been receiving 800,000 marks a month and the remainder of the crew wages in proportion.

AGREEMENTS AND JOINT SERVICES

In addition to well-thought-out building programmes, the forming of agreements between themselves or with foreign companies has been the means whereby the German shipping companies have been able to re-establish their overseas services, while conserving their resources. The best known of these agreements is that between the Hamburg-America Line and the United American Lines (Harriman Trust), whereby they operate a joint service and act as the agents for one another in their respective countries. The Hamburg-America Line also formed an agreement with the Russian Government, which led to the formation of the German Russian Transport Company for the traffic between the two countries. The North German Lloyd entered into an agreement with the United States Mail Steamship Company (Shipping Board), but this is now more in the nature of a friendly understanding than a close working agreement. The Hamburg-America Line owns 100 per cent of the stock of the German Levant Line and is financially interested in the Woermann Line, the German East Africa Line and other companies. An exchange of shares was recently arranged between the Hamburg-America Line and the Hamburg South American Steamship Company. The North German Lloyd is financially interested in the Woermann Line, the German East Africa Line, the Hamburg-Bremer Africa Line, and the Roland Line.

With regard to the other steamship companies, the German Australian and the Kosmos Lines have pooled resources for the reconstruction of their fleets. They operate services to the Dutch East Indies and Australia, to the latter country in conjunction with the North German Lloyd and Alfred Holt & Company of Liverpool. The Kosmos Line also operate a joint service with the Roland Line and the Hamburg-America Line to the West Coasts of Central and South America. The German companies operating to Africa have formed a joint service, in which the Woermann Line, the German East Africa Line, the Hamburg-America Line and the Hamburg-Bremer Africa Line participate. The first two companies are closely allied. To the Far East the Hamburg-America Line and the North German Lloyd work in co-operation with Alfred Holt & Company and Ellermann & Bucknall. The Hansa Line operates a joint service to Spain and Portugal with the Oldenburg-Portuguese Company.

During the last two years the German shipping companies have returned to most of the international conferences to which they belonged before the war. The Hamburg-America Line participates in the Atlantic Conference for passenger traffic between Europe and North America, the Brazil and River Plate Passenger Conference, the East Asiatic Conference, the Cuba-Mexico Steerage Conference, and the West Indian Freight Conference. The North German Lloyd has rejoined the first three of these conferences, and the Hamburg South American Steamship Company has rejoined the Brazil and River Plate Passenger Conference.

PRINCIPAL STEAMSHIP COMPANIES

The following table compiled from figures given in the *Schiffahrt Jahrbuch* shows the number and tonnage of the vessels belonging to the principal German steamship companies in September, 1922:—

	Number of Vessels	Total Tonnage
Hamburg-America Line	97	371,682
North German Lloyd	22	105,056
Hamburg South American Steamship Company	12	92,344
Hansa Line	19	108,241
Hugo Stinnes Lines	20	107,011*
German Australian Steamship Company	10	53,305
Woermann Line	9	46,655
Kosmos Line	7	36,419
German East Africa Line	6	32,417
Roland Line	11	28,768
German Levant Line	17	20,816
Hamburg-Bremer Africa Line	6	18,473
Oldenburg-Portuguese Steamship Line	10	18,000
Schroeder, Hoelken & Fischer	7	13,641
Rickmers Line	2	11,959

* Including two tank motor ships, two tugs and two barges.

Since last September four large vessels have been practically completed for the Hamburg-America Line and also four large steamers for the North German Lloyd. According to the annual report of the Hamburg-America Line, 26 ocean-going vessels of a total tonnage of 98,936 register tons were delivered to them during 1922 and a further 7 steamers with a total tonnage of 35,004 register tons were put into service during the first quarter of 1923. The company has further under construction 14 ocean-going ships of a total tonnage of 108,000 tons. The Hamburg-America Line also acquired by purchase last year the steamers *Brasilia* (6,682 tons), *Galicia* (ex *Thessalia,* 61,146 tons), and the *Toledo* (ex *Kigoma,* 8,105 tons).

RECONSTITUTION OF OVERSEAS SERVICES

In order to judge how far the German steamship companies have succeeded in re-establishing their overseas connections, some particulars with regard to the services now being maintained may be of value.

Hamburg-America Line.—This, the leading German steamship company, operates a joint service with the United American Lines between Hamburg and New York. It is the intention of the company to maintain this service with the steamers *Albert Ballin, Deutschland, Thuringia, Westphalia* and *Hansa,* the last three being of the one-cabin type of passenger steamer. The *Württenberg* and *Bayern* now on this route are being diverted to South America in anticipation of increased emigration to that continent. In addition to the New York service this company has regular sailings from Hamburg to Baltimore, Boston, Philadelphia and Norfolk. The other services of the Hamburg-America Line are to Brazil and the River Plate; fortnightly to Cuba-Mexico; to the West Indies and the west coast of South America; to the Far East; and to Africa.

North German Lloyd.—This company has been more cautious and slower than its rival in re-establishing its services. It now operates the Bremerhaven-New York route with three steamers, but with the delivery this year of the *Columbus, München, Bremen* and *Stuttgart*, it will be possible to maintain a weekly service with vessels of the most modern type. The North German Lloyd also runs steamers from Bremen to Philadelphia and Baltimore. The company is following the same plan as the Hamburg-America Line in endeavouring to establish in skeleton as many lines as possible of its own. Besides the North American route, regular sailings are now maintained from Bremen to Brazil and the River Plate; to the Far East; and to Australia.

Hamburg-South American Steamship Company.—This, formerly the third German shipping company, has been the most successful in quickly re-establishing its former services. The modern oil-burning mail steamers *Cap Polonio, Cap Norte* and *Antonio Delfino,* have been maintaining a monthly service between Hamburg and Rio de Janeiro, Santos, Montevideo and Buenos Aires. In addition there is a fortnightly service to Central Brazil, a monthly service to southern Brazil, and a three-weekly cargo service to the River Plate.

Hugo Stinnes Lines.—This new venture of the Stinnes concern has so far prospered and three services are maintained to South America in conjunction with the Artus Line of Danzig; to Cuba-Mexico; and to the Far East. Passenger and freight steamers run to South America, the largest vessel being the *General Belgrano* (6,210 tons net). There are monthly sailings of passenger steamers and fortnightly sailings of freight boats. To Cuba-Mexico the Hugo Stinnes Lines have monthly sailings with limited accommodation for passengers. To the Far East a monthly service of freight boats is maintained in connection with the Conference. Three new steamers of 9,000 tons gross are being put on this run.

The Hansa Line, Bremen, early ordered the construction of 16 new steamers, which have now been delivered. These together with the ships purchased from abroad have enabled the company to re-establish its regular sailings of steamers from Hamburg and Bremen to Spain, Portugal and India. The services at present are fortnightly to Karachi and Bombay and fortnightly to Colombo, Madras, Rangoon and Calcutta. Most of the vessels belonging to this line are freight boats of between 5,000 and 6,000 tons gross.

German Australian and Kosmos Lines.—These two companies have agreed to co-operate for a period of 80 years and have the financial backing of one of the large Ruhr coal and iron undertakings. The German Australian Company in conjunction with the North German Lloyd and Alfred Holt and Company of Liverpool, maintain a monthly service from Hamburg and Bremen to Australia and in conjunction with three Dutch lines a weekly service is maintained to the Dutch East Indies, a steamer of the German Australian Line sailing once a month. The latter company also operates to South Africa in conjunction with the German Africa Line.

The Kosmos Line runs steamers in a joint service with the Roland Line and the Hamburg-America Line from Hamburg and Bremen to the west coast of South America through the Panama canal and through the straits of Magellan, and to the west coast of Central America and Mexico through the Panama canal. The service to Ecuador, Peru and Chile through the Panama canal is maintained by alternate sailings of the Kosmos and Roland Lines about every ten days and the other two services are monthly with steamers of the three participating lines. It is hoped to extend to the Pacific coast of North America during the coming year. The German Australian and Kosmos Lines used the indemnity received from the German Government jointly for the reconstruction

of their fleets and the vessels are operated under joint management, but the two companies still retain their independence. During 1922 there were delivered 10 steamers to the companies, while 5 of their former vessels were repurchased from abroad. During the first part of this year a further three vessels are being completed for each company.

The African Lines.—The German steamship companies to Africa have been adversely affected by the loss of the German colonies, which formed the chief basis for their existence. In order to prevent competition with one another, a joint German African Line has been formed by the Woermann Line, the German East Africa Line, the Africa Line of the Hamburg America Company, and the Hamburg Bremer Africa Line. The services maintained include regular sailings to the west coast of Africa, to the Cape, around Africa, to Angola, to Liberia, to the Congo, to the Gold Coast and Nigeria, and to Walfish Bay and Durban. The Woermann Line and the German East Africa Line are closely allied and the ships of both companies are being operated on joint account. The two companies are also related financially to the Hamburg-America Line.

Rickmers Line.—This company has now eight steamers and has re-established its service from Hamburg to Singapore, Hongkong, Shanghai, Kobe, Yokohama, Dalny and Vladivostok with monthly sailings.

Other Companies.—Among other German steamship companies with ocean services there may be mentioned Schroeder, Hoelken & Fischer with sailings to South America; the Ozean Line to Mexico; Oldenburg-Portuguese Line to Spain and Portugal; and the German Levant Line, German Orient Line, Robert Sloman, jr., and Roechling Menzell & Company to Spain, Portugal, the Mediterranean and Black Sea.

IMPROVING PROSPECTS IN MOROCCO

High hopes are entertained, says the *British Export Gazette*, that crops will be good this year in Morocco, although so far the rainfall has been below the normal. If anticipations are fulfilled, an incentive will be given to commerce which has been sadly lacking during the past two unsatisfactory years. At present trade in almost every department is depressed, and before any volume of new business can be initiated existing large stocks must be dispersed. This applies equally to machinery, hardware, and textiles. A good crop will provide the market with greater purchasing power.

As to the actual requirements of Morocco, it must be remembered that it is necessary to cater for both European and native needs, the latter covering cotton and woollen goods, enamelled and galvanized iron hollow-ware, galvanized iron buckets, candles, soap, and such foodstuffs as tea, coffee, sugar, and rice. For European consumption there are in constant request building materials, galvanized iron sheets, cement, timber, motor cars, ready-made clothing, and a wide range of provisions. Morocco must always depend upon its grain and fruit harvests for its prosperity, but as agriculture is brought more under the influence of modern methods, including irrigation, seed selection, and more effective implements, it will rely less upon the incidence of rainfall. In addition to this better means of transport, both by road and rail, are now being established and new agricultural regions are being brought into direct touch with the commercial centres and the ports. In spite of drawbacks, many of which are now being gradually overcome, Morocco is a most promising market.

FOREIGN TRADE OF BRAZIL; WITH NOTES ON THE COMMODITIES IMPORTED

TRADE COMMISSIONER E. L. MCCOLL

I

Rio de Janeiro, June 1, 1923.—In arriving at the following figures the value of the milreis has been taken as 12 cents.

Brazilian exports for the year ending December, 1922, were valued at $279,840,080, and imports at $198,315,600, thus leaving a balance in favour of exports of $81,524,480. The countries which head the list of destination of exports are as follows: United States, $108,598,800; France, $30,899,880; Great Britain, $27,649,800; Argentine, $19,068,840; Germany, $16,898,520; Holland, $15,694,320; Italy, $15,440,160.

The first seven countries which head the list of origin of imports are as follows: United Kingdom, $51,253,200; United States, $45,471,240; Argentine, $27,066,120; Germany, $17,668,440; France, $11,755,740; Italy, $7,672,140; Belgium, $6,314,760.

The United States leads the world in value of products bought from Brazil, while the United Kingdom leads in the value of goods sold to Brazil. In the former case the value of products purchased by the United States from Brazil is greater than that of the next four countries combined.

Official figures from the United States show that during the ten months ending October, 1921, the United States shipped to Brazil products to the value of $52,276,558, while for the same period in 1922 (the latest statistics available here) the value amounted to $35,036,304, a decrease of 33 per cent from the previous year. Canadian exports to Brazil for the twelve months ending January, 1922, amounted to $2,187,197, and for the same period ending January, 1923, the value was $1,691,639 or a decline of 23 per cent from the previous twelve months.

The following are some of the principal products imported by Brazil during the twelve months ending December, 1913, 1921 and 1922. As values are given out by the Brazilian Government both in milreis and pounds sterling it has been thought best, in the comparison between the figures of different years, to employ the latter currency owing to the variability in the value of the milreis.

	1913 £	1921 £	1922 £
Iron and steel (raw)	791,000	1,278,000	570,000
Iron and steel manufactured	8,085,000	6,963,000	4,051,000
Wool (raw)	581,000	500,000	608,000
Lumber and timber	946,000	184,000	166,000
Coal, coke, etc	4,612,000	2,987,000	2,544,000
Cement	1,467,000	945,000	1,206,000
Skins and hides	985,000	454,000	643,000
Manufactured products.—			
Cotton	3,914,000	2,532,000	2,588,000
Rubber	365,000	272,000	399,000
Automobiles and other vehicles	3,089,000	1,373,000	1,386,000
Wool	735,000	847,000	505,000
Earthenware, crystal glass and porcelain	1,084,000	855,000	776,000
Machinery tools	7,164,000	9,559,000	1,515,000
Paper	1,509,000	2,214,000	5,651,000
Chemical products, drugs, etc	1,406,000	1,122,000	1,539,000
Wheat flour	2,135,000	1,659,000	2,050,000
Value of total imports for 12 monthe ending December	£67,166,000	60,468,000	48,641,000

The value of imports for 1922 shows a decrease of about 20 per cent from the previous year, while it is only about two-fifths of that for 1920. Some of the important classes of goods are outlined in more or less detail below:—

IRON AND STEEL, RAW

Importations of unmanufactured iron and steel have fallen to one-fourth of what they were two years ago. This is specially noticeable in pig and cast-iron, the importation of which is steadily decreasing owing to local production. The demand for steel rods and bars and steel plates, however, should improve in the near future as importation is at the very minimum, and as the condition of commerce becomes gradually sounder increased consumption will demand a greater supply. Imports of the undermentioned products have been as follows:—

		1913	1920	1921
Steel bar and rod	Tons	7,200	10,419	7,281
Steel plate	Tons	2,996	4,421	1,864
Iron bar and rod	Tons	40,557	38,324	20,091
Iron plates and sheet	Tons	9,438	11,055	8,344
Pig and cast iron	Tons	19,623	6,994	1,079

IRON AND STEEL MANUFACTURED PRODUCTS

The value of importation of iron and steel manufactures during 1922 has declined over 40 per cent from that of 1921 and is less than one-third that of 1920. The quantity of this material imported during the twelve months ending December is, however, considerable, amounting as it does to nearly $20,000,000. A review of some of the articles which come under this heading should prove of interest.

PLAIN, BARBED AND OTHER WIRE

Plain and barbed wire are two very important products in the matter of quantity imported. For the year ending December, 1921, 8,753 tons of barbed wire and 12,233 tons of other steel wire were brought in. The importation of barbed wire from the United States for the years 1920 and 1921 and 1922 is as under:—

		1920	1921	1922
United States	Tons	33,375	5,453	13,071
Other countries	Tons	11,711	3,300	not known
		45,087	8,753	not known

The type of barbed wire most popular is called "Waukghan" and is 4 point 3 inches apart in bundles of 32 kg. net for 14 gauge and in bundles of 38 kg. net for 12½ gauge.

As wire nails are now manufactured locally there is little chance of any increase in importation. There is, however, a good demand for nail wire which is received in coils of 50 kg. Base prices are 0 to 8 gauge and in some cases 5 to 8 with fixed differences for higher gauges. Other wire as follows was imported from the United States during the twelve months ending December 1921 and 1922.

		1921	1922
Wire, except barbed, plain iron or steel galvanized	Tons	3,535	7,235
Insulated wire and cable	Tons	.....	728

TIN PLATE

Although there has been a falling off in tin plate, there should soon be an increased demand for this product as canning factories are being established all over the country. Vegetable oil is only one of the hundred-and-one products whose manufacture is on the increase and which require tin plate containers.

The amount of tin plate imported for the years ending December, 1920 and 1921, was as follows:—

		1920	1921
United States	Tons	23,629	4,298
Great Britain	Tons	4,216	1,760
Other countries	Tons	1,931	149
		29,776	6,207

With reference to the packing of tin plate, it was noticed that some shipments arrived in iron-hooped boxes, each 20 inches by 28 inches, containing 56 sheets and weighing 107 pounds gross.

WHEAT FLOUR

As there is a good market for wheat flour the following outline of the situation should be of value. Wheat flour, which shows an increase in importation over the previous year, was imported from the Argentine, the United States, Paraguay and Uruguay, as follows:—

		1918	1920	1921	1922
Argentine	Tons	103,906	51,347	31,185	.....
United States	Tons	56,929	55,581	26,296	42,463
Paraguay	Tons	1,910	304	106	.....
Uruguay	Tons	6,119	2,137	5,390	.....
Other countries	Tons	1,241	10	2,630	.....
Total		170,160	109,379	65,607	120,113

From the above figures it is seen that the United States is supplying about one-third of the imported flour, which for the year amounted in all to 120,113 tons. The importation of wheat for the same period was 436,358 tons.

Brazil produces about 5 per cent of its wheat requirements, but this cultivation is increasing. It may be said therefore that 95 per cent of the flour required is either imported or made from imported wheat. As wheat produces flour to the extent of about 70 per cent of its weight, 436,358 tons of wheat would be equivalent to 305,450 tons of flour. The year's consumption of flour, of which about 27 per cent is imported, would therefore be 440,563 tons, made up as follows: imported wheat, 305,450 tons; national wheat, 15,000 tons; imported flour, 120,113 tons.

There are numerous mills throughout the country, including several which are quite large. One British company has about £1,000,000 invested in its entire plant. To protect this industry there is a duty of 25 milreis (25$000) per ton. As duties are payable at the rate of 60 per cent gold and 40 per cent paper, and the ratio of the paper milreis to the par value is quoted at the moment as 1 to 5·52,* this 25-milreis duty becomes 92·8 milreis (92$800) paper. If 10·7 cents is taken as the present value of the paper milreis, the duty on flour is $9.93 per ton. The national miller, however, requires to pay a duty of 10 milreis per ton, which converted in gold and paper becomes 37·12 milreis (37$120) or $3.97. However, owing to the fact that the ton of wheat only produces 700 kg. of flour, the duty really becomes $5.67. Owing to the American preference, United States flour receives a rebate of 30 per cent of the duties. Wheat flour therefore pays the following duties per ton according to origin: national miller, $5.67; United States, $6.95; Canada, $9.93; Argentine, $9.93.

The United States thus enjoys a preference over Canadian and Argentine flour of about 13 cents per bag of 44 kg. This preference over the Argentine allowed the United States to obtain a share of the imports for the year 1922 to the value of $2,700,331. One Canadian milling company is so enterprising

* Gold vales which are quoted daily are sold by the Government for the payment of customs duties. On the day of the above quotation it took 5.52 paper milreis to buy one milreis gold vale.

that, in spite of this tariff handicap and the extra cost of shipping via the United States, it has decided to enter the Brazilian market. This company is advertising here and shipments are already en route preparatory it is understood to the keeping of large stocks on hand in Brazil.

CEMENT

The quantity of cement imported during 1922 was slightly more than double that of the previous year. Figures are only available by countries up to October, 1922, when the imports amounted to 261,793 tons. Germany headed the list with 93,120 tons, while the United States came fifth with 19,728 and Canada eighth with only 2,554 tons. As in the case of wheat flour the United States receives a rebate on duties on cement, but only 20 per cent in this case. The full duty at the present exchange amounts to $5.96 per ton of 1,000 kg. and the rebate of 20 per cent to $1.19 or about 18 cents per barrel of 150 kg. One Canadian company, in spite of this preference and the lack of direct shipping, keeps a large stock on hand in Sao Paulo.

CODFISH

Imports of codfish amounted to 16,321 tons valued at £965,000 for the 12 months ending December, 1922. For the year ending December, 1921, codfish was imported from the undermentioned countries as follows (tons of 1,000 kg.) United States, 562; Great Britain, 970; Norway, 2,432; Canada, 4,277; Newfoundland, 9,367; other countries, 213.

At the present time Norwegian codfish and the saithe from Scotland are very prominent in Rio de Janeiro. Codfish is quoted at an equivalent of about $12 per case of 58 kg. net weight. The package used here is chiefly the case, which must be strong, weighing about 10 kg. (22 pounds), thus making the gross weight of the package 68 kg. Generally speaking, partly owing to the slight decrease in buying but more especially to the advantages which competitors have in shipping facilities, Canadian fish seems to be losing ground.

[The second and concluding part of this report will be published in the next number of the *Commercial Intelligence Journal.*]

BELGIAN INDUSTRIAL, FINANCIAL AND TRADE CONDITIONS

Trade Commissioner A. S. Bleakney

Brussels, June 6, 1923.—A railway strike which began on May 17 by an interruption of the Antwerp-Brussels service and was later extended to other points, at one time threatened to become general, but owing to the firmness of Government measures, the men returned to work on June 1 without conditions. The strike partially paralyzed, for a fortnight, many branches of industry and caused losses which, at Antwerp, are calculated to be enormous. Owing to the interruption of coal deliveries, production contracted to a dangerous degree, and at Antwerp the grain trade suffered heavy losses. Since the end of the strike, a number of important orders have again been placed, mostly for quick delivery, and several have been placed in England. Nevertheless, prices in the iron and steel trade are inclined to be weak, owing to order books being more or less depleted. The conclusion of the strike was marked by a stiffening of foreign exchanges, and these two factors have contributed to re-establish general trading.

The latest Belgian loan, yielding 5·07 per cent net, was a surprising success, having been oversubscribed several times. A notable feature of the loan was the number of small subscriptions. These bonds, which were issued at 492·50 francs, have since risen to 497·00 francs.

The imports for April have just been published and show an increase in tonnage imported of 52 per cent over March, while in values there is a negligible decrease. Exports have also improved in weight, but not to the same degree, the increase being only 10½ per cent, while export values have slightly shrunk.

For the first quarter of this year, the principal countries exporting to Belgium in order of importance, by values in millions of francs, are as follows: France 609·6, Britain 484·5, Holland, 298·5, Germany 128·00, Switzerland 118·3, United States 93·4, Argentine 87·6, Italy 52·6. Separate figures for Canada are not given but as the Dominion is credited with shipments valued at over 55 million francs in grain alone, Canada's place is between Argentine and Italy. Insofar as wheat is concerned, the United States shipped during the quarter to a value of 110·4 million francs, Argentine 107·6 millions, and Canada 51·2 millions.

REGISTRATION OF TRADE MARKS AND LABELS IN MEXICO

The article on the registration of trade marks and labels in Mexico, which was published in the *Commercial Intelligence Journal* of March 31, 1923, has been printed in leaflet form. Copies of the leaflet will be sent to interested Canadian firms on application to the Director, Commercial Intelligence Service.

ITALIAN IMPORT DUTIES ABOLISHED ON CERTAIN MEATS AND FISH

Mr. W. McL. Clarke, Canadian Trade Commissioner, Milan, Italy, cabled the Department of Trade and Commerce, Ottawa, with reference to Italian import duties as follows: "Tariff rates effective 12th June abolished duties on codfish, herrings, bacon, frozen and prepared meats, lard, hams, tinned salmon, gross weight not exceeding ½ kilogramme, tariff for cattle per head reduced to 30 gold lire."

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain	:*Minnedosa*	Montreal	July 3
" " "	†*Leviathan*	New York	July 4
" " "	*Montrose*	Montreal	July 6
" " "	*Empress of Scotland*	Quebec	July 7
" " "	*Regina*	Montreal	July 7
" " "	†*Mauretania*	New York	July 10
" " "	*Montlaurier*	Quebec	July 13
" " "	*Megantic*	Montreal	July 14
Ireland only	‡*Metagama*	Montreal	July 5
France	**Antonia*	Montreal	July 7
Union of South Africa	**Cochrane*	Montreal	July 15
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela	*Chaudiere*	Halifax	July 6
St. Kitts, Antigua, Barbados, Trinidad, Br. Guiana	**Canadian Carrier*	Montreal	July 11
Bahamas, Jamaica, Colombia, British Honduras	**Canadian Fisher*	Montreal	July 6
Cuba, Jamaica and Colombia	**Otter*	Halifax	July 11
China and Japan	*President McKinley*	Victoria	July 1
" "	*Empress of Russia*	Vancouver	July 12
Australia and New Zealand	*Makura*	Vancouver	June 29

† Letter mail only. * Parcel Post and specially addressed correspondence only.

‡ Letter and paper mail only.

: The *Minnedosa* will also be used for direct mail for the Continent including direct Parcel Post to France.

NOTE.—*Re* despatch July 7. Quebec City and Maritime Provinces will despatch via *Empress of Scotland*, which will also be used for direct mail for the Continent. Montreal and West will despatch via *Regina*. All direct Parcel Post to France will be forwarded by the *Antonia*.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING JUNE 19, 1923.

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement of the nominal closing quotations for all the principal exchanges for the week ending June 19, 1923. Those for the week ending June 12 are also given for the sake of comparison.

		Parity	Week ending June 12, 1923	Week ending June 19, 1923
Britain.. .. .. £	1.00	$4.86	$4.7247	$4.7311
France.. .. ..Fr.	1.	.193	.0657	.0657
Italy.. .. ..Lire.	1.	.193	.0476	.0476
Holland.. .. ..Florin.	1.	.402	.4014	.4013
Belgium.. .. ..Fr.	1.	.193	.0567	.0542
Spain.. .. ..Pes.	1.	.193	.1537	.1520
Portugal.. .. ..Esc.	1.	1.08	.0486	.0485
Switzerland.. .. ..Fr.	1.	.193	.1841	.1836
Germany.. .. ..Mk.	1.	.238	.000011	.000008
Greece.. .. ..Dr.	1.	.193	.0281	.0306
Norway.. .. ..Kr.	1.	.268	.1709	.1698
Sweden.. .. ..Kr.	1.	.268	.2723	.2716
Denmark.. .. ..Kr.	1.	.268	.1806	.1832
Japan.. .. ..Yen	1.	.498	.5030	.5050
India.. .. ..R.	1.	2s.	.3187	.3196
United States.. .. ..$	1.	$1.00	1.0240	1.0228
Mexico.. .. ..$	1.	.498	.4966	.4967
Argentina.. .. ..Pes.	1.	.424	.3525	.3669
Brazil.. .. ..Mil.	1.	.324	.1075	.1086
Roumania.. .. ..Lei	1.	.198	....	....
Jamaica.. .. .. £	1.	4.86	4.7420	4.7432
British Guiana.. .. ..$	1.	1.		
Barbados.. .. ..$	1.	1.		
Trinidad.. .. ..$	1.	1.		
Dominica.. .. ..$	1.	1.		
Grenada.. .. ..$	1.	1.	.9690—.9984	.9703—.9985
St. Kitts.. .. ..$	1.	1.		
St. Lucia.. .. ..$	1.	1.		
St. Vincent.... .. ..$	1.	1.		
Tobago.. .. ..$	1.	1.		
Shanghai, China.. .. ..Tael	1.	.708	.7488	.7517
Batavia, Java.. .. ..Guilder	1.	.402	.3917	.3912
Singapore, Straits Settlements...$	1.	.567	.5593	.5587

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "The Commercial Intelligence Branch of the Department of Trade and Commerce, Ottawa," or the Boards of Trade at St. John, Halifax, Quebec, Sherbrooke, Montreal, Peterborough, Toronto, Woodstock, St. Mary's (Ont.), Winnipeg and Vancouver; the Chambers of Commerce at Hamilton, St. Catharines, Stratford, Brantford, London, and Victoria (B.C.); Border Chamber of Commerce, Windsor; the Canadian Manufacturers' Association Offices at Toronto, Montreal, Winnipeg, Vancouver and Victoria; and the Kitchener and Waterloo Manufacturers' Association, Kitchener, (Ont.).

Foodstuffs

1768. Grocery and Provision Lines.—A firm in Constantinople would represent Canadian manufacturers and shippers of grocery and provision lines, such as canned fish, fruit, vegetables and meats, condensed milk, bacon and hams, lard, butter, cheese, eggs, flour, macaroni, oatmeal, cereal foods, sugar, apples, etc.

1769. Provisions.—A firm in Hamburg desire to represent Canadian exporters of provisions and delicacies.

1770. Oats and Vegetables.—A broker and commission merchant of Havana, Cuba, wishes to represent Canadian exporters of oats, potatoes (in barrels), canned vegetables, and beans.

1771. Wheat.—A Hamburg firm seek connections with Canadian exporters of wheat.

1772. Grain.—A firm in Bremen wish to represent a first-class Canadian grain exporting house.

1773. Fodder.—A Hamburg firm seek connections with Canadian exporters of fodder.

1774. Miscellaneous.—A commission agent of Brussels wishes to receive quotations for hay, grain, forage, oilcake, dried fruits, etc.

1775. Pork.—A firm in Marseilles wish to be put in touch with Canadian exporters of salted and pickled pork.

1776. Miscellaneous.—An important firm in Marseilles desire to act as agents for Canadian exporters of canned salmon and lobster, lard, butter, wood-pulp, sausage casings (beef middles and sheep's casings, first cut).

1777. Milk Powder.—A London firm who are regular buyers of milk powder 100 per cent soluble in cold water would like to receive quotations from Canadian producers for 10-ton lots c.i.f. London.

1778. Apples.—A Rio de Janeiro firm wish to hear from Canadian exporters of apples.

1779. Whisky.—A firm in Hamburg desire to act as representatives for a Canadian brand of whisky.

Miscellaneous

1780. Cotton Goods, Woollen Textiles and Haberdashery.—An Italian firm would like to receive offers.

1781. Cotton Textiles and Cotton Yarns.—A Milan firm would like to communicate with Canadian exporters.

1782. Grey Cotton Textiles.—Requested by a Milan firm.

1783. Textiles and Ready-made Cloths.—A Roman firm wish to establish a business connection with Canada.

1784. Textile Goods, Stockings and Carpets.—A firm in Rome inquire for the foregoing commodities.

1785. Textile Goods, Knitted Goods and Haberdashery.—A large firm in Milan handling the above articles would like to be put in touch with Canadian exporters.

1786. Raw Cottons.—Requested by a Milan company.

1787. Woollen Textiles, Cotton and Knitted Goods.—A firm in Rome wish to import the foregoing.

1788. Linen, Woollen and Cotton Textiles.—A Genoa firm are anxious to import these commodities.

1789. Draperies for Men and Women.—A firm in Naples are desirous of importing these commodities.

1790. Wool Waste.—A firm in Hamburg are anxious to trade with Canada in noils, brush waste, spinning and other waste.

1791. Asbestos.—A Brazilian firm wish to get into touch with Canadian exporters of asbestos plaited packing; millboard; yarn in rolls of 900 grammes; asbestos and I.R. tape and cloth with wire insertion; asbestos rolled cloth with I.R. core; and canvas packing (Tuck's form), No. 0, also with I.R. core.

1792. Scythe and Rake Handles.—A Sheffield firm ask to be placed in touch with exporters with a view to future business.

1793. Agricultural and Small Tools.—A Sheffield firm ask to be placed in touch with manufacturers of these commodities.

1794. Tool Handles.—A Sheffield firm ask to be placed in touch with exporters of hammer, pick, shovel and fork handles, with a view to future business.

1795. Machinery.—A merchant in Port of Spain, Trinidad, would like to get in touch with makers of machinery for the manufacture of cocoa in powder (hydraulic pressure machinery included).

1796. Railway Supplies and Ship's Tackle.—A prominent merchant house in Bombay wishes to receive c.i.f. Bombay quotations on American rail devices such as rail joints, anchor plates, automatic couplers; also ship's tackle, pulley blocks, bolts, and a high-class enamel for interior decoration similar to "Paripan."

1797. Fireproof Safes.—A manufacturers' agent in Newfoundland wishes to secure an agency for fireproof safes.

1798. Minerals.—A Hamburg firm seek connection with Canadian exporters of minerals.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From Montreal

To Antwerp.—Bolingbroke, June 30; Minnedosa, July 3—both Canadian Pacific Steamships, Ltd.; Canadian Challenger, Canadian Government Merchant Marine, July 4; Rawtry, Canadian Pacific Steamships, Ltd., July 7; Welland County, I.C. Transports, Ltd., July 14; Melita, Canadian Pacific Steamships, Ltd., July 18; Canadian Planter, Canadian Government Merchant Marine, July 18; Seattle Spirit, Rogers & Webb, July 20.

To Avonmouth.—Welshman, White Star-Dominion Line, June 29; Parthenia, Anchor-Donaldson Line, July 7; Caledonian, July 7; Oxonian, July 14—both White Star-Dominion Line; Cabotia, Anchor-Donaldson Line, July 14; Turcoman, White Star-Dominion Line, July 21; Concordia, Anchor-Donaldson Line, July 21.

To Belfast.—Marloch, June 28; Metagama, July 5; Marburn, July 19—all Canadian Pacific Steamships, Ltd.

To Belfast and Dublin.—Melmore Head, Head Line, June 24.

To Cardiff and Swansea.—Canadian Victor, July 4; Canadian Mariner, July 13—both Canadian Government Merchant Marine.

To Cherbourg.—Minnedosa, Canadian Pacific Steamships, Ltd., July 3; Antonia, Anchor-Donaldson Line, July 7; Melita, Canadian Pacific Steamships, Ltd., July 18; Ausonia, Anchor-Donaldson Line, July 21.

To Copenhagen and Baltic Ports.—General Konsul Pallisen, June 24; Helmer Morch, June 30; Florida, July 8—all Scandinavian-American Line; Anthony, Sprague Lines, July 15.

To Dundee and Hull.—Ariano, Furness Line, July 14.

To Glasgow.—Marloch, Canadian Pacific Steamships, Ltd., June 28; Gracia, Anchor-Donaldson Line, June 28; Metagama, Canadian Pacific Steamships, Ltd., July 5; Athenia July 6; Saturnia, July 13; Cassandra, July 20—all Anchor-Donaldson Line.

To Hamburg.—Deuel, Rogers & Webb, June 25; Fanad Head, Head Line, June 27; Hoerda, June 30; Porsenger, July 7—both I.C. Transports, Ltd.; West Kebar, July 10; Seattle Spirit, July 20—both Rogers & Webb; Essex County, I.C. Transports, Ltd., July 21.

To Havre.—Welland County, I.C. Transports, Ltd., July 14.

To Liverpool.—Montcalm, Canadian Pacific Steamships, Ltd., June 29; Coracero, Cunard Line, June 29; Canada, White Star-Dominion Line, June 30; Montrose, Canadian Pacific Steamships, Ltd., July 6; Lakonia, Cunard Line, July 6; Regina, White Star-Dominion Line, July 7; Corinaldo, Cunard Line, July 13; Megantic, White Star-Dominion Line, July 14; Montclare, Canadian Pacific Steamships, Ltd., July 20; Doric, White Star-Dominion Line, July 21.

To London.—Virgilia, Cunard Line, June 30; Bolingbroke, Canadian Pacific Steamships, Ltd., June 30; Vasconia, Cunard Line, June 30; Chickahominy, Furness Line, June 30; Canadian Challenger, Canadian Government Merchant Marine, July 4; Bawtry, Canadian Pacific Steamships, Ltd., July 7; Antonia, Cunard Line, July 7; Grey County, I.C. Transports, Ltd., July 12; Verentia, Cunard Line, July 14; Alleghany, Furness Line, July 14; Canadian Planter, Canadian Government Merchant Marine, July 18; Ausonia, Anchor-Donaldson Line, July 21.

To Manchester.—Manchester Regiment, June 28; Manchester Shipper, July 5; Manchester Division, July 12; Manchester Brigade, July 19—all Manchester Lines, Ltd.

To Newcastle and Leith.—Cairndhu, June 29; Cairnavon, July 6—both Thomson Line.

To Norwegian Ports.—Idefjord, Norwegian-American Line, July 14.

To Plymouth.—Antonia, July 7; Ausonia, July 21—both Anchor-Donaldson Line.

To Rotterdam.—Deuel, Rogers & Webb, June 25; Fanad Head, Head Line, June 27; Hoerda, I.C. Transports, Ltd., June 30; West Kebar, Rogers & Webb, July 10; Grey County, I.C. Transports, Ltd., July 12.

To Southampton.—Minnedosa, July 3; Melita, July 18—both Canadian Pacific Steamships, Ltd.

To St. John's (Nfld.), via Charlottetown (P.E.I.).—Canadian Sapper, Canadian Government Merchant Marine, June 29, July 17, and fortnightly sailings.

To Brisbane, Sydney, Melbourne and Adelaide.—Trewyn, New Zealand Steamships Co., July 11.

To Auckland, Wellington, Lyttelton and Dunedin.—Trelevan, New Zealand Steamships Co., July 20.

To Melbourne, Sydney, Auckland, Wellington, Lyttelton and Dunedin.—Canadian Cruiser, Canadian Government Merchant Marine, June 26.

To Bermuda, Barbados, Trinidad and Demerara.—Borden, Canadian Pacific Steamships, Ltd., June 26.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—Canadian Fisher, July 6; Canadian Forester, July 27—both Canadian Government Merchant Marine.

To St. Kitts, Antigua, Barbados, Trinidad and Demerara.—Canadian Squatter, June 27; Canadian Carrier, July 11—both Canadian Government Merchant Marine.

To South America—Rio de Janeiro, Santos, Montevideo, Buenos Aires, Bahia Blanca.—Hilarius, Houston Line, July 1.

To South Africa.—Cochrane, Elder-Dempster & Co., July 15.

From Quebec

To Liverpool.—Canada, June 30; Regina, July 7; Megantic, July 14; Doric, July 21—all White Star-Dominion Line; Montlaurier, Canadian Pacific Steamships, Ltd., July 13.

To Cherbourg, Southampton and Hamburg.—Empress of Britain, June 30; Empress of Scotland, July 7; Empress of France, July 21—all Canadian Pacific Steamships, Ltd.

From Halifax

To Bermuda, St. Kitts, Antigua, Montserrat, Dominica, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad and British Guiana.—Royal Mail Steam Packet Co., July 6, and every fortnight.

From North Sydney, N.S.

To Newfoundland.—Kyle, Newfoundland Government Railway Commission, tri-weekly (Tuesday, Thursday and Saturday).

From Vancouver

To Bombay.—Canadian Britisher, Canadian Government Merchant Marine, Aug. 10.

To Liverpool, London, Rotterdam and Antwerp.—Loch Goil, Royal Mail Steam Packet Co., early July.

To London, Rotterdam and Antwerp.—Drechtdyk, Holland-American Line, June 28; Dinteldyk, Royal Mail Steam Packet Co., late July.

To Honolulu, Suva, Auckland and Sydney.—Makura, Canadian-Australasian Royal Mail Line, June 29; Niagara, Canadian-Australasian Royal Mail Line, Aug. 3.

To Auckland, Sydney, Melbourne and Adelaide.—Canadian Prospector, Canadian Government Merchant Marine, June 25.

To Sydney and Melbourne.—Canadian Importer, Canadian Government Merchant Marine, July 30.

To New Zealand and Australia.—Waikawa, Canadian-Australasian Royal Mail Line, July 18.

To Melbourne and Sydney.—Wairuna, Canadian-Australasian Royal Mail Line, July 14.

To Wellington, Melbourne and Sydney.—Hauraki, Canadian-Australasian Line, Aug. 14.

To Kobe, Shanghai, Hong Kong and Manila.—Grace Dollar, Canadian Robert Dollar Co., June 28.

To Yokohama and Kobe.—Hakata Maru, July 13; Tokiwa Maru, Aug. 2—both Nippon Yusen Kaisha Line.

To Yokohama, Kobe and Shanghai.—Canadian Highlander, Canadian Government Merchant Marine, July 15.

To Yokohama, Kobe, Shanghai and Bombay.—Canadian Transporter, Canadian Government Merchant Marine, June 30.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Canada, June 28; Empress of Australia, July 26—both Canadian Pacific Steamships, Ltd.

To Yokohama, Kobe, Moji, Dairen, Shanghai and Hong Kong.—Hawaii Maru, July 8; Alabama Maru, July 18; Arabia Maru, Aug. 5—all Osaka Shosen Kaisha Line.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Empress of Russia, July 12; Empress of Asia, Aug. 9—both Canadian Pacific Steamships, Ltd.

To Yokohama, Kobe, Shanghai, Hong Kong and Manila.—Harold Dollar, Canadian Robert Dollar Co., July 10.

To Yokohama, Kobe, Hong Kong, Manila, and Cebu, P.I.—Achilles, July 12; Philoctetes, Aug. 2—both Blue Funnel Line.

From Victoria

To Honolulu, Suva, Auckland and Sydney.—Makura, Canadian-Australasian Royal Mail Line, June 30; Niagara, Canadian-Australasian Royal Mail Line, Aug. 4.

To Manila (via Oriental Ports).—Admiral, Pacific Steamship Company, June 30, and every twelve days.

To Yokohama, Kobe, Shanghai and Hong Kong.—Empress of Canada, June 28; Empress of Australia, July 26—both Canadian Pacific Steamships, Ltd.

To Yokohama, Kobe, Nagasaki, Shanghai and Hong Kong.—Iyo Maru, Nippon Yusen Kaisha, June 30; Empress of Russia, Canadian Pacific Steamships, Ltd., July 12; Shidzuoka Maru, Nippon Yusen Kaisha, July 16; Yokohama Maru, Nippon Yusen Kaisha Line, Aug. 4.

To Yokohama, Kobe, Shanghai, Hong Kong and Manila.—Empress of Canada, Canadian Pacific Steamships, Ltd., June 28.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

Lucien Pacaud, Secretary to the Office of the High Commissioner for Canada in London. Kinnaird House, Pall Mall East, London, S.W. 1, England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada, and Newfoundland, 285 Beaver Hall Hill, Montreal, Que. Telegraphic address: "Britcom."

The British Trade Commissioner (for Ontario), 24 Adelaide St. West, Toronto, Ont. Telegraphic address: "Toroncom."

The British Trade Commissioner (for British Columbia), 210 Winch Bldg., Vancouver. Telegraphic address: "Vancom."

The Officer-in-Charge, British Trade Commissioner's Office, 703 Union Bank Bldg., Winnipeg. Telegraphic address: "Wincom."

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address, Canadian.*

Australia

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil

E. L. McColl. Address for letters—Caixa Postal 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China

J. W. Ross. Address for letters—P.O. Box 300. Office—Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba

Address: 400 and 401 Teniente Rey 11, Havana. (Post Office Box 1290.) *Cable Address, Cantracom.*

France

Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland

Norman D. Johnston, Zuidblaak 26, Rotterdam, *Cable Address, Watermill.*

India and Ceylon

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico

C. Noel Wilde. Address for letters, Apartado Num. 126-bis, Mexico City. Office, Edificio Banco de Londres y Mexico, Num. 30. *Cable Address, Cancoma.*

New Zealand

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa

W. J. Egan, P.O. Box 683; office, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements

A. B. Muddiman, P.O. Box 121, Singapore. (Territory covers Straits Settlements. British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

Douglas S. Cole, Acting Trade Commissioner, Sun Building, Clare street, Bristol. *Cable Address, Canadian.*

Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States

Frederic Hudd, 44 Whitehall street, New York City. *Cable Address, Cantracom.*

CANADIAN COMMERCIAL AGENTS

Australia

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark

C. E. Sontum, Grubbegd, N. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

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1041

Commercial Intelligence Journal

Vol. XXVIII June 30, 1923 No. 1013

SUBSCRIPTIONS TO THE COMMERCIAL INTELLIGENCE JOURNAL FOR THE YEAR BEGINNING JULY 1 ARE NOW DUE: $1 PER ANNUM TO ADDRESSES IN CANADA (SINGLE COPIES 5 CENTS EACH); $3.50 TO ADDRESSES OUTSIDE THE DOMINION (SINGLE COPIES 10 CENTS EACH). IT WILL BE ASSUMED THAT READERS WHO DO NOT FORWARD THEIR SUBSCRIPTIONS IMMEDIATELY NO LONGER DESIRE TO RECEIVE THIS PUBLICATION, AND THEIR NAMES WILL ACCORDINGLY BE REMOVED FROM THE MAILING LIST. REMITTANCES MAY BE MADE BY POST OFFICE OR EXPRESS ORDERS, OR DRAFTS, OR CHEQUES, PAYABLE AT PAR IN OTTAWA.

NOTE—THE SUBSCRIPTION PRICE FOR THE PROJECTED FRENCH EDITION OF THE "JOURNAL" WILL NOT APPLY UNTIL JANUARY 1, 1924.

DEPARTMENT OF TRADE AND COMMERCE
OTTAWA, CANADA

MINISTER
HON. J. A. ROBB

DEPUTY MINISTER
F. C. T. O'HARA

COMMERCIAL INTELLIGENCE SERVICE
H. R. POUSSETTE, Director

Printed by F. A. ACLAND, Printer to the King's Most Excellent Majesty

1042

TABLE OF CONTENTS

Commercial Intelligence Journal

Issued Every Saturday by the Department of Trade and Commerce

Ottawa **June 30, 1923** **No. 1013**

TRADE COMMISSIONER J. E. RAY'S ITINERARY IN ONTARIO

Mr. J. E. Ray, Canadian Trade Commissioner, Manchester, who has been on a business tour in the Maritime Provinces and Quebec, will shortly undertake a tour of Ontario, the itinerary for which is as follows:—

Belleville	July 4
Toronto	July 5 to 14
Guelph	July 16 to 18
Galt	July 19
Kitchener	July 20 to 23
Stratford	July 24
Chatham	July 25
London	July 26 to 28
Ingersoll	July 30
Brantford	July 31 to August 1
Welland	August 2
St. Catharines	August 3 to 6
Hamilton	August 7 to 9

Firms in Toronto who desire to be brought in touch with Mr. Ray or to interview him, should direct their communications to the Secretary of the Canadian Manufacturers Association or to the Secretary of the Board of Trade, and in the case of Hamilton to the Secretary of the Chamber of Commerce of that city. In the case of all other cities and towns included in the itinerary, requests for interviews should be addressed to the local Chamber of Commerce or Board of Trade.

SUMMARY OF THE TRADE OF CANADA FOR MAY, 1923

The summary of the trade of Canada for May, 1923, shows that, as represented in dollars, imports for consumption were valued at $84,265,266 in May, 1923, as against $66,121,374 in May, 1922, and $68,502,067 in May, 1921. The imports from the United Kingdom in May, 1923, were valued at $12,451,616, as against $11,324,018 in May, 1922, and $8,602,506 in May, 1921. The imports from the United States in May, 1923, were valued at $58,905,414 as against $44,106,933 in May, 1922, and $47,729,585 in May, 1921. The total imports for the twelve months ending May, 1923, were valued at $841,094,801, as against $727,808,246 for the corresponding period in 1921-22, and $1,162,360,362 for the twelve months ending May, 1921.

The value of the exports of Canadian produce for the month of May, 1923, was $74,814,554, as against $69,146,171 for May, 1922, and $59,552,886 for May, 1921. The exports to the United Kingdom were valued at $23,052,536 in May, 1923, as compared with $29,255,704 in May, 1922, and $22,768,422 in May, 1921. The exports to the United States were valued at $37,571,484 during May 1923, as against $28,830,890 in May, 1922, and $27,109,349 in the corresponding month of 1921. The value of the total exports of Canadian produce during the twelve months ending May, 1923, was $958,844,577, as against $738,470,730 for the corresponding period in 1921-22, and $1,161,298,358 for the twelve months ending May, 1921.

The month's returns show an unfavourable balance of trade of $9,450,712, the returns for the twelve months' period show a favourable balance of $177,749,776.

SUMMARY OF THE TRADE OF CANADA: MONTH, TWO MONTHS AND TWELVE MONTHS ENDING MAY, 1923

(Compiled by External Trade Branch, Dominion Bureau of Statistics)

Main Groups	Month of May, 1923			Two Months ending May, 1923			Twelve Months ending May, 1923		
	Total Imports	From United Kingdom	From United States	Total Imports	From United Kingdom	From United States	Total Imports	From United Kingdom	From United States
Imports for Consumption	$	$	$	$	$	$	$	$	$
Agricultural and vegetable Products	19,030,544	2,340,541	8,574,523	32,255,442	4,478,686	14,300,269	168,992,596	27,252,190	75,199,651
Animal Products	3,894,947	333,574	2,661,042	6,946,878	617,990	4,748,869	47,496,964	3,364,251	34,731,790
Fibres and Textile Products	15,020,357	5,234,721	7,630,666	29,595,995	11,212,143	14,228,739	174,914,739	70,872,675	80,246,344
Wood, Wood Products and Paper	3,696,348	222,726	3,366,929	6,951,832	407,073	6,340,581	37,290,261	2,679,013	33,359,968
Iron and Its Products	18,136,659	1,855,799	16,101,694	32,326,493	3,051,654	28,968,063	149,125,943	13,833,370	133,466,672
Non-Ferrous Metal Products	4,209,278	409,700	3,537,827	7,850,675	705,051	6,688,605	40,126,484	3,885,094	33,889,072
Non-Metallic Mineral Products	13,626,885	1,027,128	12,072,034	24,815,415	1,818,931	21,862,003	150,617,654	13,386,742	125,443,644
Chemicals and Allied Products	2,600,954	375,326	1,990,936	4,636,022	704,173	3,414,590	26,419,419	3,835,170	18,859,361
All Other Commodities	4,049,294	652,101	2,969,763	7,067,834	1,110,134	5,295,876	46,110,741	7,217,597	34,592,346
Total Imports, 1923	84,265,266	12,451,616	58,905,414	152,446,586	24,105,835	105,847,595	841,094,801	146,326,102	569,788,848
1922	66,121,374	11,324,018	44,106,933	113,816,828	19,067,404	76,976,179	727,808,246	114,080,354	503,645,810
1921	68,502,067	8,602,506	47,729,585	133,812,914	22,122,393	89,288,565	1,162,360,362	192,461,463	812,307,579
	Total Exports	To United Kingdom	To United States	Total Exports	To United Kingdom	To United States	Total Exports	To United Kingdom	To United States
Exports (Canadian Produce)	$	$	$	$	$	$	$	$	$
Agricultural and Vegetable Products	24,866,726	15,579,986	2,719,184	41,536,303	24,164,945	3,842,070	405,283,961	265,104,372	39,205,968
Animal Products	9,057,988	3,643,006	4,317,974	14,969,189	6,140,602	7,030,856	137,692,535	65,646,887	55,744,816
Fibres and Textile Products	897,208	149,432	534,062	1,429,103	252,346	894,980	8,569,236	1,086,876	5,097,031
Wood, Wood Products and Paper	22,549,600	635,454	20,795,138	39,942,455	1,260,627	36,341,247	241,438,946	19,665,895	204,316,443
Iron and its Products	5,466,056	756,524	1,473,088	10,630,172	1,577,096	2,514,144	55,910,496	12,130,180	10,836,671
Non-Ferrous Metal Products	6,349,123	1,355,029	4,022,876	9,994,214	1,755,355	6,316,539	50,641,602	9,256,701	31,963,014
Non-Metallic Mineral Products	2,424,655	103,683	1,820,316	4,577,862	213,860	3,381,831	29,872,797	826,959	22,831,487
Chemicals and Allied Products	1,468,998	341,450	724,054	2,541,443	512,998	1,273,012	14,769,807	2,311,654	8,002,729
All other Commodities	1,734,200	487,972	1,164,792	2,836,064	782,563	1,921,136	14,665,197	2,816,574	10,268,176
Total Exports, 1923	74,814,554	23,052,536	37,571,484	128,456,805	36,660,392	63,515,815	958,844,577	378,846,098	388,266,335
1922	69,146,171	29,255,704	28,830,890	101,063,671	36,881,739	44,329,698	738,470,730	301,042,769	286,834,041
1921	59,552,886	22,768,422	27,109,349	102,833,621	35,200,645	50,084,300	1,161,298,358	316,090,895	525,198,321
Exports (Foreign Produce)									
Totals, 1923	1,234,706	66,689	951,468	1,920,531	97,884	1,545,510	13,717,835	810,214	11,123,092
1922	1,312,549	110,946	1,032,768	2,047,090	138,751	1,689,921	13,757,365	995,549	11,465,267
1921	1,181,079	108,785	1,027,637	1,976,054	144,720	1,740,188	17,650,598	1,391,185	14,827,332

CANADIAN MANUFACTURERS LOSE OPPORTUNITIES IN INDIAN MARKET

Trade Commissioner H. A. Chisholm

Calcutta, May 17, 1923.—Canadian manufacturers of hardware, metals and kindred lines are losing a real opportunity in this market because this office has not been kept supplied with catalogues and samples, together with prices of goods of the type which have until very recently been coming in large quantities from Germany. The French occupation of the Ruhr has caused an actual shortage of many lines of hardware in the Indian bazaars on account of the inability of German manufacturers to fill their contracts. Scores of German firms are now pleading *force majeure* and are asking for further time for delivery. Meanwhile indents are piling up as expected deliveries from Germany have not come to hand. As a result this office has within the last fortnight received requests from several European and Indian merchants for catalogues, samples and prices of such lines as bar iron, steel bars, nails, screws, hinges, gas pipes, hose, pick axes, bolts, nuts, tacks, rivets, tools, babbit metal, zinc sheets, etc.

In several reports published in the *Commercial Intelligence Journal* with reference to the Indian market, the necessity of keeping this office supplied with catalogues, prices and samples has been urged upon Canadian manufacturers. In a few instances half a dozen catalogues were received from each firm, and in some cases samples were received. In the majority of cases, however, manufacturers despatch only one or two catalogues to this office. Of course it entails some small expense to ship out a dozen catalogues and a few samples, and a little trouble to work out c.i.f. prices, but unless manufacturers are prepared to go to this trouble, it is really impossible to accomplish anything for them. A demand for a given article of Canadian manufacture may not appear for several months, and then quite suddenly an opportunity may present itself for stepping into the market under good auspices, but unless prices and samples are at once available in Calcutta the opportunity is lost.

HOW TO KEEP IN TOUCH WITH THE INDENT BUSINESS

The Calcutta manager for a large English merchant indent house specializing in hardware this week showed the writer some of the many letters, catalogues and samples he receives weekly from German, Belgian, and Scandinavian firms in their efforts to keep their names and products before him. This manager never places orders direct but sends in weekly indents to the London office, which buys in the cheapest market able at that time to supply the goods required. Continental firms are fully aware of this custom, but nevertheless they realize that it is of great importance to them to bring their names and products to the attention of the offices in the East where the indents originate. In this particular instance it appears that, notwithstanding the fact that within the last two or three years several items of his indents were filled from Canada, this Calcutta manager had not received a single letter or catalogue from a Canadian firm. As a result his impression is that Canadian firms are really not interested in the Indian market or they would have made some effort to ascertain the source of the business they had obtained through his London office.

The real origin of most of these indents is the native bazaar merchant, who has a hazy idea that Canada is a British colony somewhere in the vicinity of the United States and who is very sceptical of the industrial abilities of any

British "colonies." These bazaar merchants buy most of their requirements through the Indian offices of an English merchant indent house such as the one referred to. If the manager of, say, this Calcutta office is able to convince his bazaar customers that Canadian goods are just as good as the German lines he is accustomed to, he will take the sahib's ford for it. But the sahib can hardly do this unless he himself is convinced of Canada's industrial and commercial ability. The Canadian Trade Commissioner personally can and does effect a good deal of propaganda work in this way, but his efforts are futile unless backed by intelligent and persistent co-operation from Canadian manufacturers.

LITTLE KNOWLEDGE OF CANADIAN GOODS IN BAZAAR

If for example a bazaar dealer is shown two packages of brass screws—one from Germany priced at 8 cents and the other from Canada priced at $7\frac{1}{2}$ cents—he would at once be interested in the Canadian screws; but he would ask his sahib if the Canadian screws were as good as the German, if the Canadian screws would come packed in the way he wanted them, and if the consignment would be delivered on time. Unless the merchant is able to assure the dealer that the Canadian screws will give fully as good satisfaction as the German, the Indian dealer would buy the known German article at a slightly higher price in preference to the Canadian. He remembers the unfortunate experience he had during the war in buying indifferent Japanese and American substitutes for the well-known articles of British and Continental manufacture he had bought prior to the war, and he does not intend to again try an unknown article from a country he knows nothing about as long as he is able to buy in his old-time markets.

Perhaps the following conversation may take place some morning in the Calcutta manager's office: "Good morning, sahib. How about those brass screws you indented for me two months ago? I want them now in the worst way." Sahib replies: "Oh, Babu Dutt, Germany cannot make deliveries; English screws are too high priced, but London informs me that they have ordered some Canadian screws for you." "But Canadian screws," says Babu Dutt, "I don't know them. Are they any good? Show me some samples." Of course sahib has no samples, and Babu Dutt goes away with a fainst suspicion that some one is taking advantage of him. If the sahib were able to say to him, "Why, yes, this is the sort of screws we have ordered for you, here are some samples," Babu Dutt would go away with a feeling of confidence that his order for screws is being well looked after and that sahib is looking after his interests in his usually thorough manner.

IMPORTANCE OF CATALOGUES, SAMPLES AND PRICES

Both for Canadian manufacturers who have been selling goods to the Indian market and for those who hope to sell, it is of primary importance that several catalogues and samples accompanied by prices be supplied if possible to the London and Indian offices of the leading indent houses, and in addition to the Canadian Trade Commissioner's office in Calcutta. Where these are not furnished to the London buying agencies or to the Canadian manufacturers' own representative in London, the Canadian Trade Commissioner's office in London should be in possession of catalogues, samples and prices so that when a market does appear in India for a given Canadian line, the indent house in London may at once be able to secure samples. Canadian prices may be easily procured of course by cabling, but if the market must wait until samples are sent from Canada, the opportunity may disappear.

TRADE CONDITIONS IN GREAT BRITAIN

Trade Commissioner Harrison Watson

London, June 15, 1923.—The value of British exports during May showed an increase over that of April of no less than £9,000,000 (or 13·5 per cent), which is the highest figure attained since 1921. Despite the fact that May's results are swollen in comparison with past years by the inclusion of exports to the Irish Free State, the constant fall in prices which has taken place until quite recently indicates that there has been a substantial increase in the weights and quantities of the goods exported.

An examination of the trade returns discloses that the improvement thus noted is to a certain extent artificial, and results chiefly from the Ruhr deadlock, because while there were in May slight increases in the exports of British textiles and a few other manufactured goods, coal and certain iron and steel products are still the principal factors in the recovery. It is understood that the latter consist largely of the filling of orders which were secured some time ago when Continental difficulties first arose, while, on the other hand, it is known that the advance in prices which has been forced upon British manufacturers by the increased cost of raw materials has checked the placing of fresh business.

Conditions in many of the Eastern and other markets which were formerly outlets for British export trade continue to remain depressed and disorganized. Home trade, however, appears to maintain its recent improvement.

BRITAIN'S GROWING DEPENDENCE ON CANADA FOR WHEAT AND FLOUR

Trade Commissioner Harrison Watson

London, June 15, 1923.—The Ministry of Agriculture, continuing the investigation into the sources of supply of various articles of food consumed in Great Britain, publishes the following table showing the country's comparative home production and imports of wheat, wheat flour, barley and oats:—

Cereal Year September 1 to August 31.	Home Production. Thousand tons.	Net Imports. Thousand tons.	Total Supply. Thousand tons.	Percentage to Total Supply of Home Production. Per cent.	Imports. Per cent.
Wheat:					
1920-21	1,515	4,049	5,564	27	73
1921-22	2,027	4,401	6,428	32	68
Wheat flour (Home manufactured and imported:					
1920-21	3,794	314	4,108	92	8
1921-22	4,141	361	4,502	92	8
Barley:					
1920-21	1,391	651	2,042	68	32
1921-22	1,171	684	1,855	63	37
Oats:					
1920-21	2,215	449	2,664	83	17
1921-22	2 142	416	2,558	84	16

As regards wheat, it is estimated that about two-thirds of the home crop is milled into flour, 10 per cent is used for seed, 15 per cent for poultry food and similar purposes, the remainder being tail corn and screenings.

The report calls attention to the change which has taken place in recent years whereby the wheat and flour supplies of this country are now practically

furnished by five countries, and it is of great interest from a Canadian point of view to learn of the increasing importance which Canada occupies in this respect, both as regards wheat and flour.

This is illustrated by the following table, and a notable development is that in 1922, Canada contributed 49 per cent, of the total imports of flour into the United Kingdom, as against 34 per cent from the United States and 13 per cent from Australia:

Imports into the United Kingdom of Wheat and Wheat Flour

	Thousands of Cwts.				
Imports from	Average 1910-14	Average 1915-19	1920	1921	1922
Russia	13,691	198	2	......	......
United States	29,699	56,774	53,529	47,037	43,618
Canada	25,972	25,003	13,410	22,736	32,072
Argentina	14,133	8,965	31,087	4,240	19,207
Australia	12,830	7,577	22,023	21,911	18,805
India	18,603	4,610	20	2,669	488
Other countries	4,120	689	5,882	3,655	908
Totals	119,048	103,816	125,953	102,248	115,098

Barley.—Imports of barley in 1922 were small, amounting to only 635,000 tons against the 1910-14 average of 1,014,000 tons. The United States supplied about half, Canada one-fifth, and increasing quantities arrived from Roumania.

Oats.—Imports of oats were also less last year, 468,000 tons against the quinquennial average of 864,000 tons. Argentina, the United States and Canada accounted for more than 90 per cent of the 1922 total, Canada heading the list with 166,000 tons, while the United States supplied 148,000 tons as compared with 22,000 tons in the previous year. Imports from Canada were large even compared with pre-war years.

MILLING OFFALS

In view of representations which are being urged by certain interests in this country that the unrestricted importation of flour is creating a serious deficiency of offals, and should be regulated by the imposition of a Customs duty on imported flour, or alternatively by making it compulsory for imports of flour to be accompanied by a certain proportion of offals, it is illuminative to reproduce figures illustrative of the offal supply of the country. In this connection, the Ministry of Agriculture notes that the supply of offals available during the past cereal year was fully equal to the pre-war quantity. It is evident that any difficulties which farmers are encountering here in securing offals at reasonable prices are due to causes quite unconnected with importation of flour.

Supply of Wheat Offals

(Thousands of Tons)

Year	From Home Crop (Cereal Year)	From Imported Wheat (Cereal Year)	Net Imports (Calendar Year)	Total Supply
1911-12	321	1,438	— 186*	1,573
1912-13	287	1,582	— 137*	1,732
1913-14	283	1,391	— 11*	1,663
1919-20	279	1,146	144	1,569
1920-21	243	1,045	76	1,364
1921-22	369	1,324	72	1,765

(*) In these years exports exceeded imports.

MARKET FOR EXCELSIOR IN GREAT BRITAIN

Mr. Harrison Watson, Canadian Trade Commissioner in London, writes as follows, under date of June 13, 1923, on the prospects for excelsior importation into Great Britain:—

Previous to the war the possibility of securing a profitable outlet in this country for Canadian excelsior was the subject of periodical investigation, and also of occasional experiment by particular Canadian manufacturers. These attempts, however, were generally unsuccessful, the obstacle being the bulky nature of the material, even when shipped in pressed bales, and the consequently high cost of transportation in proportion to the intrinsic value of the article, which severely handicapped Canadian efforts in competition with sources of supply like Sweden and Holland, which are not only more adjacent but have frequent means of securing very low freights.

Until a few years ago, the United Kingdom imported practically all its requirements of wood wool—as the product is known in this country—and the prospects for Canadian competition became still less favourable when the manufacture of wood wool was inaugurated in several places in the United Kingdom.

As far as is known, there is no record available showing either the consumption or imports of wood wool, but it is certain that the quantity used is considerable, and of a range which extends from a variety coarse almost unto shavings up to the highest quality as used for surgical purposes.

Although current prices run from about £9 to £20 a ton, depending upon quality, the medium grades, which form the bulk of the demand, only realize £11 to £12 a ton (2,240 lbs.) c.i.f., United Kingdom port, into which the heavy cost of freight from Canada would eat such a big hole as to practically drive away any prospects of profit. Liner freight is charged upon a dimension basis, and it is understood that one ton by weight of medium grade excelsior occupies about 3 cubic tons.

While it seems doubtful under these circumstances that competition from Canada is possible, samples of two medium grades No. 6 and No. 7, valued respectively at £11 and £12 a ton (2,240 lbs.) c.i.f., United Kingdom port are on file at the Department of Trade and Commerce, Ottawa, and one firm—the name of which is also on file—state that they would be pleased to receive c.i.f. quotations, accompanied by samples, from Canadian manufacturers.

Excelsior is packed in pressed bales, somewhat similar to hay. The weight of the bale is 1 cwt. or 2 cwt. usually the latter.

LATEX CONTAINERS

It is no exaggeration to state, says the *Manchester Guardian Commercial*, that if the demand for latex becomes appreciable the problem of obtaining suitable containers will be found to present more difficulties than that of preservation. Some of the characteristics desirable in latex containers are inner surfaces immune from chemical action by the latex or the preservatives employed. Glass, enamelled, "tinned" iron, or zinc vessels fulfil this condition. Large vessels are more satisfactory than small ones, and those with a capacity of not less than ten gallons are advocated. A scheme has been put forward by some rubber growers to construct special tanks aboard ocean-going steamers, so that the preserved latex can be poured into them at Malayan ports and pumped out into suitable containers (*e.g.*, tanks on railway trucks or drums) at the other end of the journey. This method has actually been put into operation by an American company in Sumatra.

CANADA'S STRONG POSITION IN FLOUR TRADE OF JAMAICA

F. L. Casserly, Office of the Canadian Trade Commissioner

Kingston, Jamaica, June 11, 1923.—The latest available customs returns of flour imports into Jamaica disclose a situation highly satisfactory and encouraging to Canadian millers. The following official figures illustrate the progress of Canada's trade with Jamaica in this staple:—

FLOUR IMPORTS TO JAMAICA

(Bags of 196 lbs.)

	1921	Percentage	1922	Percentage	January 1 to March 31, 1923	Percentage
From United Kingdom..	nil	....	7	fract.	nil	....
From United States..	188,440	75	163,739	59	28,659	38
From Canada..	61,891	25	115,446	41	47,268	62
From other Countries....	54	fract.	10	fract.	nil	....
Total...	250,385		279,202		75,927	

In a report published in *Commercial Intelligence Journal* No. 1001 (April 7, 1923), which was written before the 1922 figures were prepared by the customs, Canada's share of the trade for that year was estimated at 105,709 bags; but it was pointed out that in arriving at this figure, it had not been possible to take into account the increased business which was known to have accrued to Canada in the last quarter of 1922; hence the opinion was expressed that Canada's sales for the whole year would probably be found to be considerably in excess of the figures stated. The official statistics now confirm that anticipation.

THE PRESENT SITUATION

Canada is now Jamaica's chief source of supply for flour. The largest flour distributor in Jamaica at present draws about 85 per cent of his requirements from the Dominion; smaller dealers likewise report an increase of Canadian business. Competition is keen, and the tendency is towards lower prices; even one or two Canadian mills which have recently attempted to introduce their flours into this market have found their quotations out of line with those of larger organizations in the Dominion which have been selling in this field for many years. At present, Canadian hard-wheat flour (of which practically all Jamaica's imports from Canada consist) is quoted c.i.f. Kingston at from \$6.80 to \$7 per bag of 196 lbs.; American first clear ("counter flour") at about \$5.60; and second clear ("shop flour") at from \$5.05 to \$5.20. The American flours referred to are not equal in quality to Canadian hard patents. The former supply a lower-class demand, whose extent is estimated at about 30 per cent of the colony's total requirements.

REASONS FOR INCREASE

The chief factor in the remarkable increase of Canada's business is the movement towards larger bakeries and better bread, in response to the improvement in public taste. Canadian flour gives better baking results; the smaller bakeries, which are the principal users of American flour (aside from individual householders) have declined in importance, and on the whole there is much more competition in the baking trade than formerly. Most of the well-known Canadian mills that do business in Jamaica have the advantage in price over their American competitors who sell fancy patents; doubtless the Jamaican preference of 1s. per bag on Canadian flour has helped to bring about this situation.

REVIEW OF AUSTRALIAN TRADE IN 1921-22

C. Hartlett, Office of the Trade Commissioner

I—General

Melbourne, Australia, May 21, 1923.—From the trade returns of the Commonwealth—for the fiscal year ended June 30, 1922,—published this month it is possible to review a period of remarkable contraction in the value of importations from practically all countries.

Australia imported in 1920-21, goods to a value of £163,801,826, and in 1921-22, £103,066,436; a decrease of £60,735,390. As in some other countries, this marked decrease from the record figures of the previous year is attributed to a considerable reduction in commodity values; to the imposition of much higher customs duties, and (not least) to the fact that the Australian banks were withdrawing the usual facilities for the establishment of purchasing credits abroad. Thus the trading conditions have rapidly approached the normal pre-war figures.

The exports for 1921-22 were valued at £127,846,535 as compared with £132,158,912 in 1920-21, a reduction of £4,312,377, but, considering the lower prices ruling on some leading lines of primary production, the results were far from unsatisfactory as the value of the exports exceeded that of the imports by £24,780,099. The appended table illustrates the comparative position:—

	1919-20	1920-21	1921-22
	£	£	£
Australian imports	98,974,292	163,801,826	103,066,436
Australian exports	149,823,509	132,158,912	127,846,535
Total trade	£248,797,801	£295,960,738	£230,912,971
Total trade per head	£46 18s. 1d.	£54 14s. 0d.	£41 18s. 2d.

Imports increase 1920-21 over 1919-20	£64,827,534
Imports decrease 1921-22 from 1920-21	60,735,390
Exports decrease 1920-21 from 1919-20	17,664,597
Experts decrease 1921-22 from 1920-21	4,312,377
Total trade increase 1920-21 over 1919-20	47,162,937
Total trade decrease 1921-22 from 1920-21	65,047,767

OVERSEA TRADE OF THE DIFFERENT STATES

The relative trading importance of each Australian state is illustrated in the appended schedule showing the values of imports and exports in 1921-22. The principal trading ports were Sydney, Melbourne, Brisbane, Adelaide, Fremantle, Hobart and Darwin.

	1921-22 Imports.	1921-22 Exports.
New South Wales	£43,321,478	£48,012,511
Victoria	36,352,056	34,644,182
Queensland	8,639,446	17,573,103
South Australia	9,047,242	14,747,260
Western Australia	4,308,141	10,797,000
Tasmania	1,385,958	2,067,443
Northern Territory	12,115	5,036
	£103,066,436	£127,846,535

AUSTRALIAN IMPORTS 1919-20 TO 1921-22

The Australian imports of United Kingdom origin in 1921-22 were valued at £53,011,926, while those produced in Canada were valued at £3,146,450. The

imports into the Commonwealth according to countries of origin are tablulated thus:—

	1919-20	1920-21	1921-22
United Kingdom	£38,516,436	76,849,934	53,001,926
Canada	2,640,280	4,425,262	3,146,450
Other British possessions	12,593,430	14,011,226	9,860,681
Total British countries	53,750,146	95,286,422	66,009,057
Total foreign countries	45,224,146	68,515,404	37,057,379
Total imports	£98,974,292	163,801,826	103,066,436

COMPARISON OF FREE WITH DUTIABLE IMPORTS

The appended schedule gives the figures relating to the free and dutiable imports into Australia with the Customs duties collected:—

	1920-21.	1921-22.	Decrease. Increase.
Free imports of merchandise into Australia	£ 62,467,773	38,400,193	24,067,580
Dutiable imports of merchandise into Australia	101,313,909	64,622,939	36,690,970
Specie and bullion imports	20,144	43,304	23,160
Total imports	£163,801,826	103,066,436	60,735,390
Customs duties collected	22,515,812	18,188,021	4,327,791

IMPORTS FROM THE UNITED KINGDOM, CANADA AND THE UNITED STATES

In the aggregate the United Kingdom, Canada and the United States supplied £74,971,489 of the total value of the importations (£103,066,436) in 1921-22, leaving £28,094,947 to be credited to all other countries. The imports from all three countries were considerably less than in the previous year.

The trend of importations of Canadian goods and products, in comparison with those from the United Kingdom and the United States, for the last two fiscal years is shown in the appended schedule, and is also reviewed in more detail in subsequent paragraphs.

Australian Imports.	1920-21.	1921-22.	Decrease.
Total imports of United Kingdom origin	£76,849,934	53,001,926	23,001,926
Total imports of Canadian origin	4,425,262	3,146,450	1,278,812
Total imports of United States origin	36,113,477	18,823,113	17,290,364

AUSTRALIAN IMPORTS FROM OTHER COUNTRIES

Amongst other countries credited with imports into Australia in 1921-22 were: Belgium, £950,952; China, £950,772; Czecho-Slovakia, £216,192; France, £2,731,739; Germany, £85,976; Italy, £944,226; Japan, £3,581,614; Netherlands, £498,824; Netherlands East Indies, £3,236,970; Norway, £848,134; Sweden, £1,238,327; Switzerland, £1,836,291; Philippine Islands £151,106; Spain, £90,727.

AUSTRALIAN IMPORTS FROM CANADA 1919-20 TO 1921-22

The appended is a comparative statement of Australian imports from Canada, during the fiscal years under review:—

Articles	1919–20	1920–21	1921–22
Cheese	£ 44	......	......
Fish, frozen	6,081	3,128	7,602
Fish, prseerved in tins	190,770	131,477	292,117
Fish, other	366	644	2,075
Sausage casings	651	16,080	10,158
Other animal foodstuffs	428	17	19
Fruits, fresh and dried	......	5,851	......
Flour (wheaten)	253	108	204
Oatmeal	46	13	12
Other prepared cereals	268	2	3

AUSTRALIAN IMPORTS FROM CANADA 1919-20 TO 1921-22—*Concluded*

Articles	1919-20	1920-21	1921-22
Other vegetable foodstuffs	1,917	17,730	1,244
Spirits	3,982	16,637	2,910
Animals, living	519	121	21
Vegetable substances	2,442	20,429	4,743
Apparel and attire	53,593	104,409	56,720
Boots and shoes	75,087	112,907	27,165
Corsets	50,106	182,909	49,610
Piece goods, cotten, etc	23,044	11,220	6,682
Sewing silks, etc	4,838	16,959	3,665
Other textiles	8,732	38,923	15,862
Oils, fats and waxes	1,613	5,110	722
Paints and varnishes	6,804	16,081	623
Ores and metals	20,116	15,307	2,230
Agricultural implements	223,259	425,435	288,942
Engines	12,224	27,609	7,701
Printing machinery	206	5	28,110
Other machinery	25,614	54,896	49,666
Metal manufactures	202,361	421,406	245,917
Rubber manufactures	311,380	251,144	89,222
Leather manufactures	25,053	19,878	8,271
Furniture	739	1,164	810
Timber	111,602	285,138	202,730
Wood manufactures	7,274	26,118	12,824
Printing paper	503,157	980,582	703,735
Stationery and paper, n.e.i	142,581	399,021	98,806
Jewellery, etc	16,652	25,535	6,610
Dental, etc., instruments	2,915	11,851	8,653
Medicines and drugs	24,456	19,232	5,879
Arms and explosives	8,179	10,349	1,832
Musical instrument	21,151	41,356	18,041
Bicycles and parts	2,989	4,653	3,939
Vehicles, motor cars and parts	518,399	650,596	854,714
All other articles	28,289	53,232	25,061
Total imports produce, or manufacture of Canada	£2,640,280	4,425,262	3,146,450

DECREASES AND INCREASES IN IMPORTS FROM CANADA 1921-22

The decrease in the total value of the importations of Canadian goods in 1921-22 in comparison with the previous year is reflected in almost every commodity. Amongst the most outstanding decreases may be mentioned agricultural implements, which decreased by £136,492; metal manufactures, £175,489; timber, £82,408; apparel and attire, £47,689; boots and shoes, £85,742; corsets, £133,299; paints and varnishes, £15,458; rubber manufactures, £161,922; printing paper, £276,847; and other paper and stationery, £300,215.

Practically the only imports which show expansion in values are fish products of various kinds, which increased in value by £166,545, and motor cars, etc., by £204,118.

AUSTRALIAN EXPORTS IN 1919-20 TO 1921-22

The value of Australian exports of merchandise in 1921-22 (excluding specie and bullion to the value of £4,328,700) aggregated £123,517,835. The figures show a contraction in the exports of merchandise of £3,160,864 in comparison with those of the previous year.

In the following schedule the total value of the exports for the years under review illustrate Australian trade within the Empire and with foreign countries:—

United Kingdom	£ 80,784,096	67,519,740	57,742,767
Canada	312,452	154,899	373,570
Other British possessions	27,537,484	25,761,469	21,469,629
Total British possessions	108,634,032	93,436,108	79,585,966
Total foreign countries	41,189,477	38,722,804	48,260,569
Grand total exports	£149,823,509	132,158,912	127,846,535

EXPORTS OF SHIP'S STORES

The value of stores shipped on board oversea vessels in Australian ports is not included in the general exports. The figures in recent years are shown thus:—

	1919-20.	1920-21.	1921-22.
Ships' stores exported..	£2,688,371	3,560,648	3,152,604

MERCHANDISE AND SPECIE EXPORTS COMPARED

The following schedule shows the relative position in the trade returns of the exports of merchandise and specie of Australian and other origin:—

Australian merchandise..	£120,997,216	119,160,362
Other merchandise..	5,712,956	4,357,473
Australian specie and bullion..	5,433,465	4,327,150
Other specie and bullion..	15,275	1,550
Total Australian produce..	126,430,681	123,487,512
Total other produce..	5,728,231	4,359,023
Grand total exports..	132,158,912	127,846,535
Excess imports over exports 1920-21..	31,642,914	
Excess exports over imports 1921-22..		24,780,099

CANADIAN TRADE WITH AUSTRALIA

The value of Canadian goods imported into Australia during the fiscal year of 1921-22 is given at £3,146,450 or $15,291,747, showing a decrease in comparison with the previous year of £1,278,812 or $6,215,026. Australian exports to Canada in 1921-22 were valued at £373,570 or $1,815,550, an increase of £218,671 or $1,062,741 in comparison with the previous year.

The figures in relation to Australian imports of goods of Canadian origin and the Australian exports to Canada, in recent years, are shown thus:—

Australian trade.	Imports from Canada.	Exports to Canada.	Total trade.
1916-17..	£1,408,091	x 6,392,579	7,800,670
1917-18..	1,667,068	785,130	2,452,198
1918-19..	2,844,050	891,529	3,735,575
1919-20..	2,640,280	312,452	2,852,732
1920-21..	4,425,262	154,899	4,580,161
1921-22..	3,146,450	373,570	3,520,020

(x Includes gold specie £6,000,000).

EXPORTS TO UNITED STATES

Particulars of Australian exports to the United States in 1921-22 compared with 1920-21 are shown in the appended table:—

	1920-21	1921-22	+ Increase. — Decrease.
Foodstuffs of animal origin..	£ 183,884	419,012	+ 235,128
Foodstuffs of vegetable origin..	217,256	48,205	— 169,051
Animal substances (wool, hides, skins, etc.)	5,037,278	5,546,885	+ 509,607
Vegetable substances..	378,476	39,916	— 338,560
Apparel, textiles, etc..	57,722	56,241	— 1,481
Oils, fats and waxes..	88,287	112,482	+ 24,195
Stones and minerals..	32,265	93,601	+ 61,336
Metals not manufactured, and ores..	464,212	110,790	— 353,422
Machinery and metal manufactures..	27,065	43,147	+ 16,082
Rubber, leather, etc..	18,193	68,498	+ 50,305
Wood (timber, etc.)..	18,665	12,702	— 5,963
Paper and stationery..	13,858	12,178	— 1,680
Jewellery, precious stones, etc..	46,213	6,243	— 39,970
Drugs, chemicals (eucalyptus oil, etc.)..	33,142	27,505	— 5,637
Gold specie, etc..	3,193,753	1,676,513	— 1,517,240
Miscellaneous articles..	155,306	40,468	— 114,838
Total exports of Australian origin..	£9,284,515	7,978,616	— 1,305,899
Total exports of other produce..	681,060	335,770	— 345,290
Total..	£9,965,575	8,314,386	— 1,651,189

AUSTRALIAN TRADE WITH THE UNITED STATES

As outlined in former reports, Australian importations of manufactured goods and products from the United States are, to a very considerable extent, analogous to Australian importations from Canada. Many lines of manufactures are quite similar in character, hence Canadian manufacturers and exporters are directly interested in the trade transacted by their chief competitors in oversea markets.

The United States trade with Australia is well organized by effective representation, either by direct travellers or through local agents, combined with the services of New York commission houses which have branch offices and sample rooms—under capable and energetic management—established at the principal Australian importing centres.

The appended schedule gives a summary of the value of the imports and exports, and the total trade in recent years:—

Trade with the United States	1919-20	1920-21	1921-22
	£	£	£
Imports from the United States	23,826,313	36,113,477	18,823,113
Exports to the United States	11,129,937	9,965,575	8,314,386
Total Trade	£34,956,250	£46,079,052	£27,137,499

Decrease of imports from United States 1919-20 from 1918-19	£ 3,357,479
Increase of imports from United States 1920-21 over 1919-20	12,287,164
Decrease of imports from United States 1921-22 from 1920-21	17,290,364

IMPORTS FROM THE UNITED STATES

The following table gives the classification and value of merchandise of United States origin, showing increases and decreases, imported into the Commonwealth in 1920-21 and 1921-22:—

	1920–21	1921–22	+ Increase — Decrease
Foodstuffs of animal origin	£ 310,202	390,545	+ 80,343
Foodstuffs of vegetable origin	362,532	152,515	— 210,017
Beverages (chocolate, cocoa, etc.)	11,510	9,855	— 1,655
Spirits and alcoholic liquors, etc	53	....	— 53
Tobacco and preparations thereof	3,362,399	2,196,951	— 1,165,448
Live animals	4,100	1,195	— 2,905
Animal substances (glue, etc.)	12,051	15,883	+ 3,832
Vegetable substances (resin, seed)	281,813	104,669	— 177,144
Apparel, textiles and mfd. fibres	4,046,592	1,607,476	— 2,439,116
Oils, fats and waxes (kerosene, etc.)	4,647,777	2,726,571	— 1,921,206
Paints and varnishes	184,698	87,564	— 97,134
Stones and industrial minerals	59,145	30,542	— 28,603
Metal and ores manufactured	195,007	67,525	— 127,482
Machinery and manufactures of metal, including motor cars, bicycles, etc	13,153,975	6,991,973	— 6,162,002
Rubber and leather manufactures (not boots), etc	1,314,408	515,899	— 798,509
Wood, raw and mfd. (furniture, lumber)	2,635,275	1,190,268	— 1,445,007
Glassware, plaster of paris, etc	323,233	166,886	— 156,347
Paper, printing, etc	1,325,978	523,048	— 802,930
Jewellery, clocks and fancy goods	342,838	227,579	— 115,259
Instruments, optical, surgical, etc	575,719	504,407	— 71,312
Drugs, medicines, chemicals, etc	1,241,070	619,059	— 622,011
Electrical material, musical instruments, etc	1,719,706	691,954	— 1,027,752
Gold, silver and bronze specie	3,396	749	— 2,647
Total imports United States origin	£38,113,477	18,823,113	— 17,200,364

AUSTRALIAN EXPORTS TO CANADA, 1921-22

Contrary to the general falling off in the Canadian imports into Australia during 1921-22, Australian exports to Canada show the substantial increase of £218,671. The total value of these exports to the Dominion (£373,570) was the largest for the past three years, and with the exception of about 2 per cent were entirely of Australian origin.

The balance of trade between the two countries is much in favour of the Dominion, hence increased exports of Australian commodities are desirable. Courteous consideration is invariably extended by this office to inquiries received from both Canadian importers and exporters of Australian goods and products (particularly those of a non-competitive character) with the object of increasing the interchange between the Dominion and the Commonwealth. The reverse seasons, and some variety in production, are helpful in the direction indicated.

Exports to Canada are shown thus:—

	19-1920. Value £	1920-21. Value £	1921-22. Value £
Foodstuffs of animal origin—			
Butter	......	......	39,934
Meats	21,011	3,085	18,029
Other	3,037	6,367	3,096
Spirits, etc	5,238	8,014	933
Vegetable products	50,469	8,313	17,914
Animal substances—			
Hides and skins	125,101	31,984	21,349
Wool	......	24,091	86,796
Other animal substances	63,833	55,547	168,540
Apparel, textiles, etc	4,107	8,578	4,057
Oils, fats and waxes	16,163	......	......
Coal	3,763	......	2,632
Metals, manufactured	10,940	291	1,731
Timber, undressed	1,405	912	3,030
All other articles	7,385	7,717	5,529
	312,452	154,899	373,570

MARKETS OF BRITISH MALAYA

By P. W. Ward

[*The subjoined is from the extended report on the Markets of British Malaya which has been prepared by the late Canadian Trade Commissioner in Singapore. The first section, on Purchases by Tender and Indent, was published in the last issue. It is intended to publish in the* Commercial Intelligence Journal *those parts of it which deal with the import trade opportunities for Canadian firms in these territories, and the completed work—which will include the sections that are now being published serially—will later be issued as a pamphlet.*]

Rubber Estate Demands

[All prices are in Straits currency ($1 = 56.6 cents Canadian). From 15 per cent to 40 per cent represents the "spread" between importers' buying and selling price.]

The rubber industry is rapidly becoming one of the leading factors in twentieth-century commerce. Its present rate of growth, together with the new uses to which rubber is being daily applied, makes its future one of remarkable power and scope. British Malaya being the cheap source of supply for raw rubber, with the possibility of an increasing production and wider cultivation, it follows that the demands of the plantation and factory are of much interest.

There are two classes of demand in the British Malayan rubber industry—plantation and factory. These are purchased through import houses in Singapore, Penang, and Kuala Lumpur, and the remaining business centres in the peninsula.

Plantation Supplies

The requirements for field use cover a small number of products of which large quantities are purchased and a larger number for which there is a more limited demand. These two classes will be dealt with in quantity sequence, and only in those articles in which Canadian sources of supply can hope to compete.

FENCING

The import returns give no indication at present of the amount of wire fencing brought into British Malaya. Large quantities are used by rubber estates in various types and patterns, all of galvanized steel, but individual preferences for height and mesh make it unnecessary to recommend particular patterns.

Galvanized barbed wire is an extensive import, the specification being two-strand, four-points 3 inches apart, in reels of 56 pounds—approximately 225 yards per reel. This wire was selling in Singapore at $7 per reel. Galvanized wire, from 12 to 24 gauge, recently sold at from $18.50 to $20.50 per pikul (133⅓ pounds). The United Kingdom, Belgium, and Germany shared in this trade during the past year.

There should be a good market for galvanized iron fence posts for plantation fencing. One Canadian house has made an effort to place steel fence posts in overseas markets, but their product is not galvanized and does not at present meet the demand here indicated.

WIRE NAILS

During 1921 a total of 33,864 cwt. of wire and rose nails was imported into the colony, the rose pattern representing a comparatively small purchase. The chief sources of supply were the United States, the United Kingdom, Belgium, and Germany, in the order named.

A recent specification of monthly requirements handed to the writer by a leading import house covers the following sizes and quantities:—

1-inch	No. 14	30 kegs.	3-inch	No. 8	120 kegs.
1½ "	No. 13	30 "	4 "	No. 6	120 "
1½ "	No. 13	30 "	5 "	No. 5	30 "
2 "	No. 11	150 "	6 "	No. 3	60 "

Belgian exporters have recently commanded the supply situation in wire nails, quoting as low as 18s. 6d. per cwt. c.i.f. Penang and Singapore. American nails were being offered at $14.50 per pikul. Canadian manufacturers were completely out of the market. The situation is, however, altering to some extent and with the possibility of a direct steamship service from Canadian Atlantic ports, Dominion sources of supply may shortly secure a better opportunity of competing for business.

Kegs of 56 pounds and 110 pounds are required. A number of the smaller import houses purchase minimum monthly shipments of two tons and upwards.

PIPING

Galvanized iron piping is used in large quantities, but this item is not classified separately in the returns. Galvanized and wrought iron piping ¾-inch, 1¼-inch, 1½-inch, 2-inch, and 2½-inch, in the usual lengths are always open for quotation. The United Kingdom leads in value of shipments, followed by the United States and Belgium.

CORRUGATED IRON

The value of the 1921 imports of corrugated iron sheets was $358,571, representing a quantity of 20,865 cwt., the United Kingdom being practically the only source of supply. The sizes in demand run from 24 gauge to 31 gauge in 6-, 7-, 8- and 9-foot lengths, shipped in cases containing 5 cwt. (560 pounds). Recent Singapore prices per pikul were: 24 gauge, $17; 86 gauge, $18.50; 28 gauge, $19.75; 30 gauge, $21.

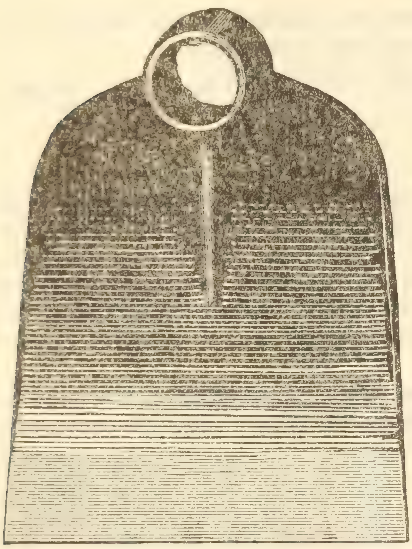
ROOFINGS

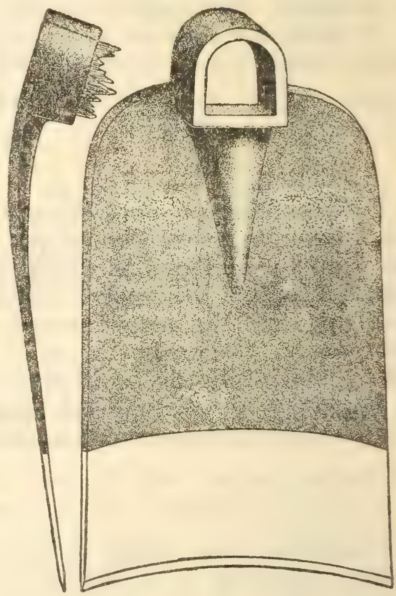
A large number of roofings have been introduced into the British Malayan market, United Kingdom manufacturers at present securing the bulk of the business. More than one Canadian manufacturer has been linked up with the territory, and his products are at present being tested out there. It must be remembered that a sun temperature of 150 degrees is frequently encountered and that, with asphalt roofings especially, this must be taken into consideration. A further factor is that there is no change in temperature from heat to cold. Recently one of the leading English makes of roofing, guaranteed to be fire-proof, waterproof, acid- and alkali-proof and not to shrink or crack, or taint water, packed in 72-foot rolls, 3 feet wide, complete with nails and cement ready for fixing, was selling in Singapore per roll as follows: 1-ply, $16; 2-ply, $19; 3-ply, $24. A 2-ply American brand was being offered at $18 per roll.

Metal roofings are not acceptable in British Malaya.

CHANGKOLS

This type of tool is common throughout the Middle East and is used in large numbers. United Kingdom manufacturers have specialized in this line and control the market. The selling practice is to price all such tools by the dozen and the tool itself, exclusive of the handle, is sold by weight. Recent





selling prices of various brands of changkol in Singapore ranged from $8 per dozen for the 2-pound size to $15 per dozen for the 4-pound size. At least one Canadian tool manufacturer is making an effort to compete in this line of demand.

AGRICULTURAL MACHINERY

While it cannot be said that any extensive demand exists for agricultural machinery in British Malaya, yet the cultivation of rubber estates and the weeding of tropical growth, which is constantly in progress, call for certain machines of this description. One Canadian plant has been represented in the territory for some time past and has made small shipments of ploughs, harrows,

hoes, disc ploughs, disc harrows, spring tooth harrows, tine cultivators, disc gang ploughs and scufflers. Some of these have been used for cultivating and weeding in connection with coconut estates, but the method applies almost equally to rubber plantation work. The disc plough and disc harrow are probably the two most popular items. Energetic representation and good follow-up methods are, however, imperative if any real results are to be obtained. Native labour is cheap and plentiful, and is careless in the handling of machinery, and in consequence there is some reluctance to introduce it.

No record of imports is available under this heading.

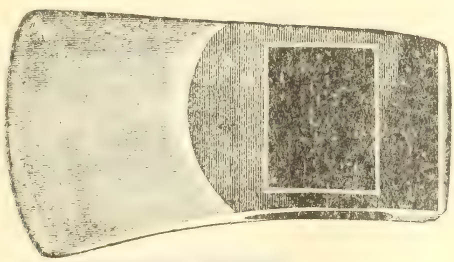
ASSAM FORKS

This is an agricultural tool used by labourers on rubber estates and for which an extensive demand exists. It differs somewhat from the type of fork used and manufactured in Canada, but can be readily made by Canadian tool makers. One Canadian house has in fact already made some headway in meeting the opportunity. United Kingdom manufacturers hold the market.

These forks are made with three and four prongs, the first-named weighing 3½ lbs. and the second 4 lbs. Recent selling prices of British Malayan import houses were $18 and $20 per dozen respectively.

AXES (PARANGS)

The American type of axe head holds the market for rubber estate use and a number of Canadian tool makers can compete so far as this type of product is concerned. Axes in demand are 3-, 3½- and 4-lb.; recent import selling prices were $19, $21 and $23 per dozen.



HANDLES

Although a preference appears to have been established for hickory handles all through the Middle East, there are certain other hardwoods which it is thought would be acceptable if properly introduced. So far as plantation use is concerned, where the labour is solely indentured Indian, and where it invariably happens that a handle breaks when the user is miles from the source of replacement, the practice is to cut and substitute the limb of a treee, and while this has an influence on demand, the annual import is very large. The sizes of axe handle chiefly required are 32-inch and 36-inch, the regular Canadian pattern being acceptable. Recent Singapore selling prices were: 32-inch, 90 cents each; 36-inch, $1 each.

The usual type of fork handle is in demand for assam forks.

SAWS

Cross cut and hack saws for tree trimming and pruning are in demand in fair quantities. Recent prices on cross cut saws were: 4-feet, $4.30 each; 5-feet, $5.30 each. Hack saw requirements run from 10-inch to 21-inch and must be of the finest possible quality.

BUCKETS

Buckets for plantation use are extensively imported. These may be classed as galvanized, riveted, 12- and 14-inch; galvanized seamed, 12- and 14-inch. Recent prices ex godown (warehouse), Singapore, were \$16.50, \$19, \$14.50 and \$16.75 per dozen, in the order named.

Enamelled buckets, without covers, for collecting rubber latex, are also largely used, the 14-inch (2-gallon) size being chiefly called for. Prices recently ranged around \$34 per dozen.

TANKS

Galvanized iron tanks, for holding rubber latex and transporting it from field to factory, are required in fair number. These range in size from 50-gallon capacity upwards. More than one Canadian plant is equipped to make an effort to share in this demand.

LATEX CUPS

These cups are required in huge quantities, one being attached to each rubber tree for catching the latex and replacement for one cause and another and another being frequent. The standard size is $3\frac{3}{4}$ inches by $2\frac{1}{4}$ inches, in tumbler form, the cups already introduced by various manufacturers being made of glass, porcelain, earthenware and other materials. New products are continually being offered by various sources of supply. Samples of the leading makes in demand will be sent fom the Singapore office to any Canadian manufacturer interested and able to supply.

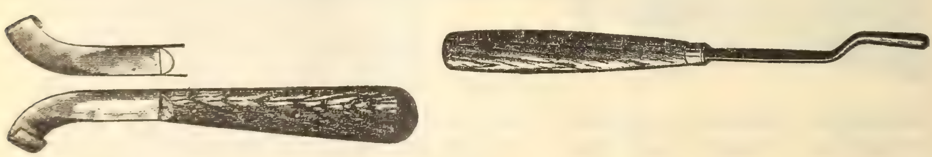
A Singapore import house recently quoted as follows:—

Porcelain No. 1, glazed	\$52 per 1,000
Terneplate No. A. 3, lead coated	\$30 per 1,000
Earthenware, glazed	\$32 per 1,000

TAPPING KNIVES AND GOUGES

These knives and gouges are used to run the grooves in the bark of the rubber tree through which the latex shall flow.

The present local selling price of knives is from \$6 to \$6.75 per dozen, and of gouges from \$3.50 to \$4 per dozen, the dimensions of the gouge in general use being $\frac{5}{16}$-inch by $\frac{1}{4}$-inch by $\frac{3}{8}$-inch.



SPOUTS AND CUP HANGERS

Galvanized corrugated iron spouts and 15-gauge galvanized wire cup hangers are items of which the annual import runs into many hundreds of thousands. Samples may be procured by interested manufacturers.

Factory Supplies

CEMENT

Cement is the chief constituent in building in British Malaya, reinforced concrete being the only form of construction in practically every class of permanent building. While local cement works have been established at Singapore and Chinese manufacturers have secured a large share of the demand in shipments from Hongkong, yet the local and the Chinese products do not compare

with the English specification brands, and in 1921 over $1,160,000 was represented by the United Kingdom export to this territory.

Under favourable shipping conditions, Canada can no doubt compete to some extent in this market. This view may possibly be confirmed by the fact that fair shipments are recorded from Denmark and Italy, and Sweden also is on record as an exporter. The total value of cement imports into British Malaya in 1921 exceeded $4,250,000.

Cement shipments to the Straits Settlements and Federated Malay States should be guaranteed up to the British standard specification and packed in casks of 400 lbs. gross, 375 lbs. net. Current competitive prices may always be obtained from the office of the Canadian Trade Commissioner at Singapore. English brands were recently being offered in Singapore at $5.57 per barrel and numerous local orders were being received by importers there ranging from 500 to 1,000 barrels at a time. One importer advertises constant stocks of 15,000 casks.

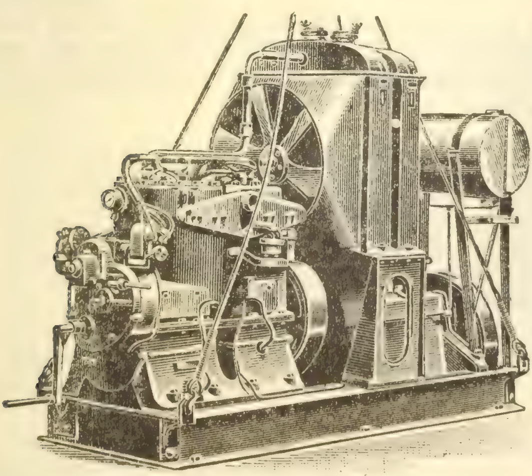
BELTING

Belting is an item of regular purchase for the rubber factory. Up to the present 90 per cent of the material in service is hair belting, which at present is not manufactured in the Dominion. In a market whose chief industry is rubber, it should not be impossible to introduce good rubber belting, and as the Canadian product has been found so eminently satisfactory under varying conditions of service, manufacturers are urged to make an effort to get into touch with this opportunity. If a real effort is made the prospect may be a surprising one, but casual methods of introduction will not bring results.

PUMPS

Rubber factories all require a pumping unit, the size of course being governed by the production required. For example, a factory known to the writer running fifteen rubber rollers or mangles, employing two Ruston-Proctor 42 h.p. internal combustion and one Hornsby 25 h.p. engine, are at the present time replacing the two engines mentioned with a Ruston-Hornsby 115 h.p. engine having sufficient surplus power to meet the possible installation of further rollers.

Nearly all rubber factories in British Malaya employ internal combustion suction gas or oil engines for their rubber rolling processes. A number of Canadian plants are equipped to compete in this connection.



Direct coupled paraffin pumping set.

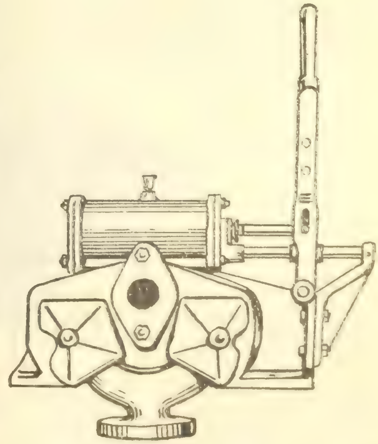
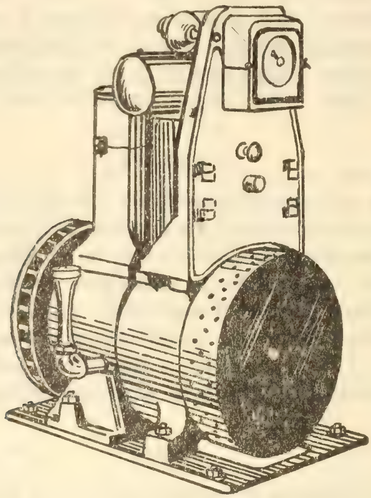


Illustration of type of hand pump in use for various work.

LIGHTING SETS

Not only in rubber factories but for many other types of building all through British Malaya, an attractive market exists for lighting sets. This is evidenced by the fact that all the leading British and American manufacturers are represented in the territory. Prices range from $1,400 upwards, the general capacity being $1\frac{1}{2}$ kw., 32 volt; larger sets run 3 and $4\frac{1}{2}$ kw., 110 volts.

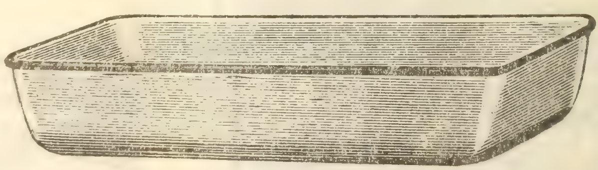
Some of the leading makes in evidence on the market are Delco, Madstrong, Lally, Lister-Bruston, Aster, Crompton, Pelaphone, Imsco and G.E.C.



The above is an illustration of a compact automatic 60-lamp (30 c.p.) lighting set, occupying small space, for petrol or paraffin fuel, complete with switchboard and battery, the latter carrying a twenty-year guarantee to give 80 per cent efficiency, which has been introduced into British Malaya. This will give possible Canadian manufacturers an idea of the type of competition to be met.

COAGULATING PANS

Coagulating pans are used in large numbers in the process of turning rubber latex into sheets. Requiring the smoothest possible surface, they are made of enamelled iron, seamless and have rounded corners. Several Canadian plants could readily compete for the business in this article.



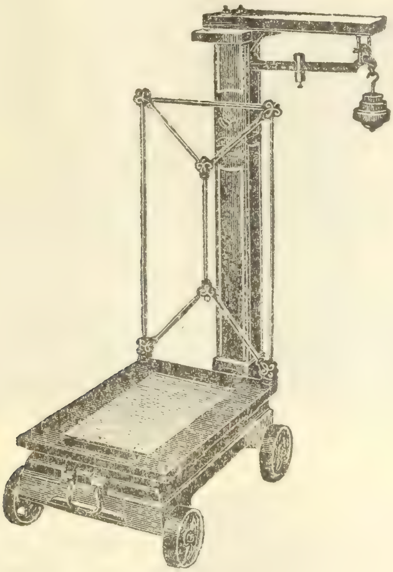
Importers' selling prices recently were as follows: 16-inch by 10-inch by 4-inch, blue tips, $2.10 each; 18-inch by 9-inch by $3\frac{1}{2}$-inch, blue tips, $1.75 each.

WEIGHING MACHINES

Weighing machines are required for the different stages of rubber manufacture at the local factories and stocks are held by all the leading import

houses. The following illustration shows the type of machine in general use.

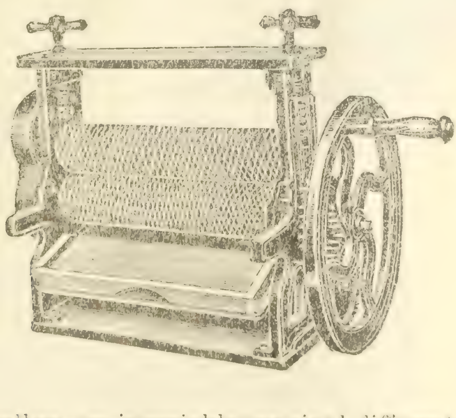
These machines should be graded in pounds and catties (catti = $1\frac{1}{3}$ lbs.). The following were recent selling prices of similar machines (complete) with the capacities enumerated: 400 lbs. (300 catties), $110; 600 lbs. (450 catties), $150; 1,000 lbs. (750 catties), $180; 1,200 lbs. (900 catties), $210.



RUBBER MANGLES

These comprise a very simple class of machine, in two types—hand and power. There is no doubt that Canadian machinery houses could enter the market for these lines, and detailed information will be secured and forwarded from the Singapore office to any interested manufacturers.

The following illustrates a type of machine in use throughout the territory, the specification and recent prices of which are as follows: plain cast iron rollers, 20-inch by 4-inch, flat top, 2 side springs, $60; 20-inch by 4-inch, bow top spring, $60.



Special types of rollers are invariably required different for rolling processes. The Bertharms rubber mangle has been popular with a number of factories visited.

ACETIC ACID

Acetic acid is the constituent used in coagulating rubber latex, important in the rubber industry, and a quality product is open to share in a substantial annual import.

The 1921 trade returns give Canada the leading place as exporter. Of a total quantity imported of 14,625 gallons, valued at $179,243, the Canadian product shipped was 22,615 gallons, valued at $93,900. The unsolicited opinion of a number of importers and users is that the Canadian product manufactured by the synthetic process is the best obtainable and has established a distinct reputation in British Malaya. Germany, the United States, Japan and Holland shared in the remainder of the business in the order named.

The future prospect in acetic acid supplies is one of extensive demand. The increasing production now taking place will mean substantial buying, and it is pleasurable to record the fact that the Canadian source of supply is fully equipped to meet the situation.

Recent quotations from German exporters range around £62 10s. per ton c.i.f. Penang, consignments being insured against full value. An American house was also sending quotations on 400-lb. barrels at 9½ cents per lb. This method of packing is, however, not acceptable, the form of packing required being in demijohns of 44-gallon capacity with wicker containers. One inquiry secured was for shipment of 1,000 demijohns per month, with a possible annual demand of from 12,000 to 15,000.

ANHYDROUS AMMONIA

The new uses to which rubber is being placed, especially in paper making, require the latex to be shipped in fluid form instead of sheets. Anhydrous ammonia is the constituent used to prepare the latex for export and is being placed on the local market in the form of ammonia gas 100 per cent, put up in steel cylinders containing approximately 100 pounds.

SODIUM SULPHITE AND BY-SULPHITE

Substantial quantities of these two chemicals are imported yearly. Unfortunately the classification gives no record of quantities or values, these items being bulked under chemicals, of which nearly $1,100,000 worth were imported. Sodium by-sulphite is called for in 1-cwt. drums, importers' selling price at Singapore recently ranging around $20 per drum. Sodium sulphite is shipped in both ½-cwt. and 1-cwt. iron drums.

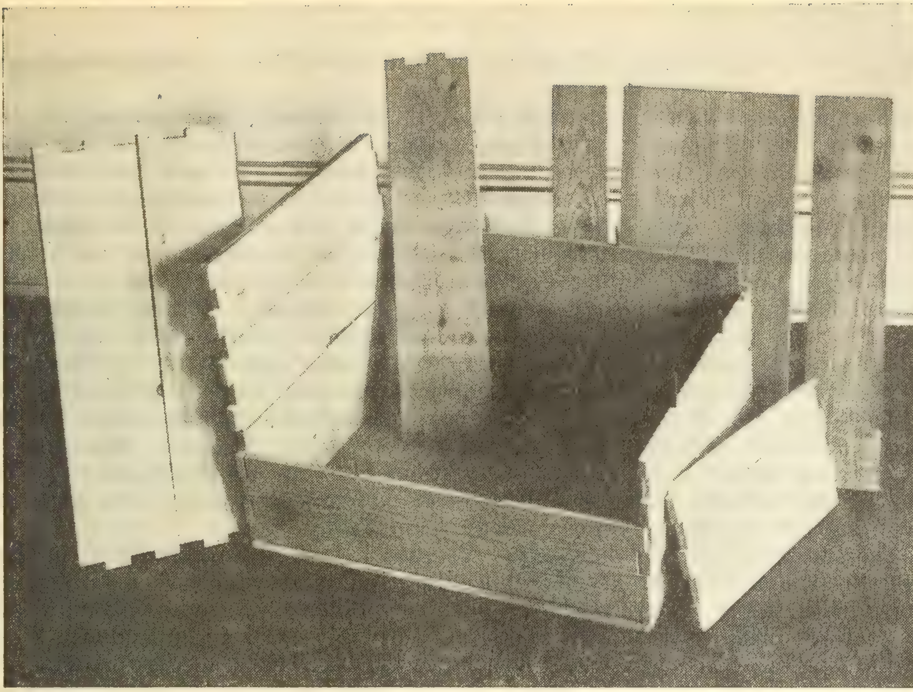
WIRE GAUZE

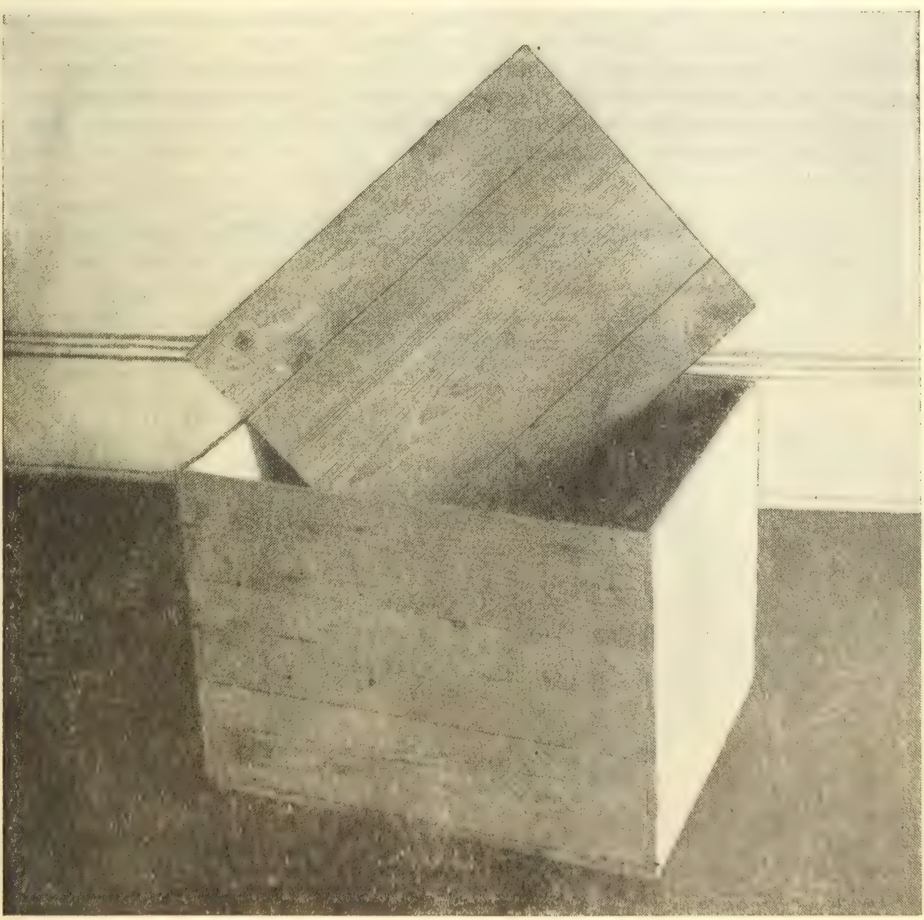
Fair quantities of wire gauze are used for latex straining and some very good business may be secured. British manufacturers have the market well in hand, but at least one Canadian source of supply is equipped to compete. Recent specifications and selling prices were as follows, the gauze being shipped in 100-foot rolls 3 feet wide:—

20 mesh	28 gauge	45c. per sq. ft.	50 mesh	35 gauge	50c. per sq. ft.
30 "	32 "	45c. "	60 "	35 "	50c. "
40 "	34 "	45c. "	60 "	37 "	50c. "
50 "	34 "	45c. "			

RUBBER PACKING CASES

One of the outstanding opportunities for Canadian manufacturers is in rubber packing cases. While no separate classification is given in the import returns, it may safely be said that the 1921 total import exceeded $2,000,000 in

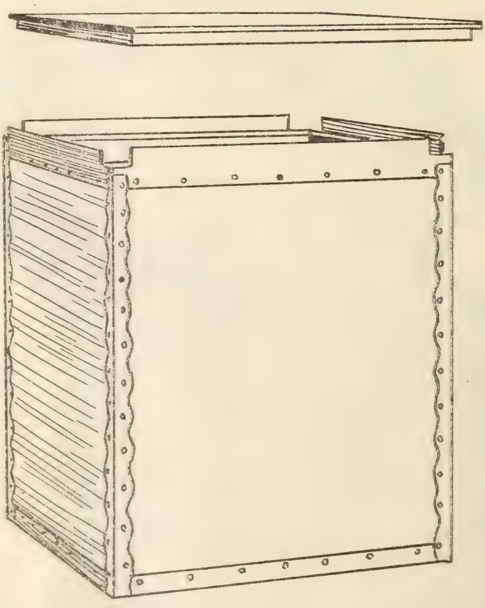




value. The chests in use in the British Malayan industry are identical in size and make with those used in rubber packing in Java, Sumatra, Ceylon and Burma, and are also used for the tea trade in India, Ceylon and Java and the desiccated coconut industry in certain of these territories. The aggregate demand is thus extremely large. Two instances alone are sufficient to indicate its extent: tea passing through Calcutta and Chittagong requires three and a half million cases annually, while the present demand for rubber cases in British Malaya exceeds one and three-quarter million annually. These figures are brought to the attention of Canadian lumber mills, especially those of British Columbia, with a view to emphasizing the remarkable opportunity which exists, and urging that a detailed study of production possibilities may be undertaken.

There are two classes of packing cases used in the rubber industry: the plain, semi-dovetailed half-inch wooden case, and the three-ply veneer case. Both have an outside measurement of 24 inches by 19 inches by 19 inches. The following illustrations show the plain wood packing case in sections prior to assembling and the assembled case ready for packing.

The illustration below shows the "Venesta" three-ply packing case largely in use in the British Malayan rubber industry and which is possibly the pioneer in three-ply cases for rubber packing. Since its introduction Japanese manufacturers have taken up the making of three-ply cases and introduced them into the market. The effort has not, however, been very successful, and the Nipponese product does not appear to be looked upon with much favour at present. The cases should be waterproof and rigid, and the process of assembling involve no possibility of protruding nails which may injure the rubber contents. The general advantage of the three-ply cases is that it is strong and allows a certain amount of bulge. The three-ply cases will, in fact, hold ten pounds more rubber than the plain wood type. A further advantage is that eleven ordinary three-ply cases may be shipped to the ton but only ten of the plain wood variety.



Recent prices of three-ply cases c.i.f. Singapore were (inclusive of fittings) as follows: "Venesta," $1.02 (Canadian); Japanese, 75 cents (Canadian).

The local cost of assembling the three-ply case is from 6 to 7 cents (Canadian), while the outfit required to assemble "Venesta" cases costs £10 15s. c.i.f. Straits ports. These are considerations in computing the laid-down price to the consumer of these cases as against the plain wood type.

Plain wood semi-dovetailed cases were first introduced by Japanese manufacturers, who hold the market at the present time. The Japanese product has heretofore been made from momi, a native wood, but latterly it is reported that Siberian white pine is being used. This is a wood of good appearance and texture and well suited for the purpose.

During the past two years British Columbia box manufacturers have been urged by the Singapore office to make an effort to compete with the Japanese product. A number of sample cases were sent over to various firms. More than one has submitted samples made from spruce and hemlock. On one occasion the quotation submitted came within a few cents of the Japanese price, but rising exchange against Canadian funds prohibited a real commencement being made in securing orders. There were also one or two points in regard to the British Columbia samples which importers commented upon. They stated that the tongue-and-groove binding in placing the shooks together was not as good as the Japanese method, which is that three holes are bored in the edge of each piece of side or top and bottom and these are then wedged together by pieces of bamboo which act as a satisfactory cleat. This may be open to argument, but it is well to take note of the criticism. One of the most important points in regard to rubber cases is that the inside surface of the wood should be absolutely smooth. Recently the Japanese price of momi cases was 59 cents c.i.f. Singapore.

It is hoped that Canadian manufacturers will make further efforts to capture at least a portion of this trade. Spruce would be quite acceptable and hemlock, if fairly clear, would also be favourably considered. Care must be taken in packing the shooks so that they are not damaged en route. A freight rate has been secured from one steamship company running between Vancouver and Singapore of $6.50 per 40 cubic feet ton.

In recapitulation, let it be said that the great essential in rubber shipment is that the product shall arrive absolutely intact. Cases must therefore be strong, waterproof and damage-proof. This entails exactness in semi-dovetailing and measurement and a smooth inside surface.

BOX STRAPPING

Satisfactory rubber shipments necessitate the strapping of the cases, and large quantities of strapping are used. The standard appears to be ⅝-inch, supplied in reels of 300 feet, the Singapore market price of which was recently $2.50 per reel, one brand being advertised at $32 per case of 20 reels. Within the past few months there has been introduced into the market more than one type of machine for the wiring of packing cases, wire being used in lieu of strapping. The process of adoption will be slow, however, as the native labour employed in rubber packing does not readily take to contrivances of this sort. A nailless box strapping is also in evidence, but this is more applicable to packing in bales than boxes and will not be taken up for rubber packing very rapidly.

MOTOR TRUCKS

A large percentage of the rubber plantations and factories, being at some distance from rail head and shipping points, require transportation of one kind or another. The bullock cart is rapidly giving way to the motor truck and the market for the latter is increasing daily. Two-, two and a half-, three- and

five-ton trucks are in evidence and these capacities will be called for. Only in a limited number of cases will one-ton trucks be sufficiently large to meet requirements.

While American trucks and chassis can be laid down in British Malaya cheaper than those from any other source of supply, many English and Continental trucks are on the market and in use. About 1,500 trucks are at present in service throughout the peninsula. Canadian plants should take definite steps to secure representation through the office of the Canadian Trade Commissioner at Singapore. The method adopted by American houses to develop business should, however, be taken note of by Canadian manufacturers. This is that a factory salesman is sent over to the territory and attached to the local house representing the American plant. In some cases this arrangement lasts for a year, in others it becomes permanent. The technical knowledge and ability of the factory salesman, together with the native knowledge and influence of the local house, ensure an efficient effort to build up business being made.

SUNDRIES

Many items in more limited use than those already referred to in the present chapter are in demand from time to time in the British Malayan rubber industry. These include the following: light rails, tipping wagons, glazed white tiles, smoke stoves, galvanized iron piping ($\frac{1}{2}$-inch to 3-inch), split pulleys, circular saws, emery wheels, galvanized corrugated iron spouts, galvanized measuring jugs (1 gallon), galvanized straining funnels, brass gauze strainers, metal rain gauges, etc.

LIST OF RUBBER COMPANIES

A list of rubber companies with plantations in the Straits Settlements, Federated Malay States, Un-Federated Malay States, British North Borneo, and Sumatra has been placed on file at the Department of Trade and Commerce, Ottawa, and should be useful to any Canadian manufacturing house desirous of mailing sales literature regarding any of the products mentioned in this chapter. The list may be seen on application to the Director, Commercial Intelligence Service.

SOUTH AFRICAN CLASSIFICATION OF PRODUCTS CONTAINING ALCOHOL

J. Cormack, Assistant Trade Commissioner

Cape Town, May 21, 1923.—Some time ago Canadian manufacturers who were exporting commodities to South Africa which contained more than 3 per cent of proof spirit or 15 per cent of under-proof spirit found that, despite the fact that the spirit in them was non-potable, they were all classified under tariff item No. 44, which imposes a duty so heavy as to make business impossible.

Representations were accordingly made from this office to the Commissioner of Customs, and it has been decided that paint removers, liquid cements and polishes, when made of, or containing, methyl alcohol, shall be admitted at the general ad valorem rate, namely 20 per cent, with a 3 per cent rebate for goods originating in the United Kingdom and reciprocating British possessions, which includes Canada.

The Commissioner adds that "a certificate accompanying the invoice by the manufacturer to the effect that the spirit used in the paint removers, etc., is methyl alcohol will be of assistance to the Department, but it will not obviate the necessity of samples being taken and submitted to the Government analyst for assay purposes from time to time."

FOREIGN TRADE OF BRAZIL; WITH NOTES ON CERTAIN IMPORTS

Trade Commissioner E. L. McColl

II

CHEMICAL PRODUCTS

The importation of chemical products was considerable, amounting as it did to 38,856 tons with a value of £1,539,000, an increase of about 30 per cent over the same period last year. During 1921, 14,816 tons of chemicals were imported of which the undermentioned are a few: acetic acid, 12 tons; sulphuric acid, 157; nitric acid, 4½; tannic acid, 5; acids unenumerated, 398; chemical manures, 2,338; carbide of calcium, 99; chloride of lime, 572; ethyl chloride, 1; glycerine, 7½; caustic potash, 1½; caustic soda, 2,899 tons.

A British importing concern stated to the writer that chemicals were at present imported principally from Europe on account of low quotations. Unless the indents of this company on its London house specify "British manufacture," Continental goods will invariably be ordered. In this line, owing to the severe competition, British packing is falling off considerably in quality in an endeavour to keep down the cost. This merchant, who is anxious to hear from Canadian manufacturers keeps a stock on hand of the following chemicals:—

Chemical	Package
	National manufacture
Sulphuric acid 60%	Carboys 60 kilos.
Muriatic acid	Carboys 42 kilos.
Nitric acid	Carboys
Arsenic (white)	Cases 100 kilos.
China clay	Casks 100 kilos,
Glycerine, white and brown	
Logwood extract, solid	Cases 23 kilos.
Formaldehyde	Carboys 40 kilos.
Fraganthe gum	Cases 60 kilos.
Hyposulphite of soda cry	Casks 50 kilos.
Nitrite of soda cry	Drum 50 kilos.
Parafina 123°	Cases 100 kilos.
	Foreign manufacture
Formic acid 80%	Carboys 60 kilos.
Oxalic acid	Casks 50 kilos.
Pyro acetic acid (white) 80%	Casks 200 kilos.
Citric acid cry	Casks 50 kilos.
Tartaric acid cry	Casks 50 kilos.
Acetate of lead (white sugar of lead)	Casks 50 kilos,
Ammonia liq. 20° Bé	Drum 100, 200 and 300 kilos.
Chrome alum cry	Casks 50 kilos.
Alum cry	Casks 50 kilos.
Bichromate of Potash cry	Casks 50 kilos.
Bichromatic of soda cry	Casks 50 kilos.
Beta naphtol sublimado	Casks 50 kilos.
Bisulphite of soda	Drum 50 kilos.
Borax cry	Casks 50 kilos.
Soda ask-alkali 58%	Casks 250 kilos.
Chloride of lime, 35/37% (bleaching powder)	Drum 150 kilos.
Phosphate of soda cry	Casks 50 kilos.
Perborate of soda	Drum 50 kilos.
Yellow prussiate of potash	Casks 50 kilos.
Yellow prussiate of soda	Casks 50 kilos.
Caustic soda 76/77%	Drum 50, 100 and 300 kilos.
Caustic soda 98%	Tins of 1 kilo, 24 per case.
Sulphate of copper cry	Casks 50 kilos.
Sulphate of won cry	Casks 50 kilos.
Sodium sulphide 60/62%	Drum 100 kilos.
Glauber salts cry	Casks 50 kilos.
Glauber salts calcined	Casks 100 kilos.
Epson salts	Casks 50 kilos.
Sulphate of allumminio 17/18%	Free from iron.
Silicate of soda, 140 T	Casks 300 kilos,
Tartaro emetic	Cask 50 kilos.
Tannine powder 88/90%	Tins 25 kilos.

RUBBER PRODUCTS

The importation of rubber goods, which amounted to 7,760 tons, is more than double that of 1921, which totalled 921 tons. This conditions is partly accounted for by the fact that in 1920 the warehouses were piled full of rubber goods with what proved to be almost a two-years' supply when the slump came. Consequently the imports for 1921 fell very considerably, and by the end of 1922 the market had come back to its normal state again. National rubber manufacturing plants, making everything from tires and hose to toys and medical supplies, are being established, and as the chief constituents, rubber and cotton fabric, are both produced here this new venture, protected as it is by a substantial tariff, has every chance of becoming a flourishing industry. Generally

speaking, the products undertaken are those which are of easy manufacture, where the technical work required is not of too high an order and where consumption makes it worth while to manufacture locally. Although the national tire is cheaper, the imported article is the one most desired. Such is also the case with high-pressure hose for air or steam conduits and certain surgical supplies, especially gloves.

Several foreign manufacturers have established the branches consisting of offices and warehouse and a strong sales organization covering the whole of Brazil. Two United States rubber manufacturers have done this, one of them carrying a complete line of products. The United States and Belgium receive a rebate of 20 per cent of the duty on all rubber goods mentioned in article 1,033 of the Brazilian Customs tariff. A few of these articles are vessels for domestic use, tobacco pouches, toys, footwear, machine packing, tissues and door-mats. Automobile tires, tubing or power belts are not included.

During 1921 the undermentioned rubber products were imported in the following quantities:—

Toys, 7,719 kg.; boots and shoes, 38,861; rubber tires and inner tubes, 279,843; sheet rubber, 24,731; hose, 119,625; solid rubber tires, 143,028; manufactures of rubber unenumerated, 106,923 kg.—a total of 720,730 kg.

One of the largest items in these lists is wheat which as a rule comes from the Argentine unless there is a shortage in that country. Purchases from Canada or the United States are therefore entirely dependent upon the wheat crop of the most southern republic and nothing better illustrates this than the shipments from the United States for the two years ending December, 1921 and 1922, which amounted to 1,655,906 and 108 tons respectively.

MACHINERY, TOOLS, ETC.

Although the importation of machinery has had a severe setback during the last year, it is by far the most important product of importation.

Brazil is commencing a period of great industrial expansion. Factories representing every imaginable product are being established all over the country. Additional to these are the countless machine shops of the different steam and electric railway and power development companies, all of which require a continual supply of new equipment to replace worn-out and out-of-date machine tools and all the other equipment characteristic of a machine shop. The Brazilian Traction, with head offices in Toronto, buys everything which a tramway and power company requires. The ninth annual report for the year ended 31st December, 1921, shows stores in hand and in transit, including construction material to the value of $6,146,849.59. (The company purchased abroad, during 1922, supplies to the value of $2,344,000.) There is a large lumber, furniture and cabinet industry which requires woodworking machinery of all descriptions. This class of work, however, requires special machinery adapted to the very hard woods which grow in Brazil. There is a large demand for construction machinery in the building of roads, railways, dams and port works. All kinds of edge tools for general carpenter and cabinet work are required. Small carpenter shops exist all through the city of Rio de Janeiro, and this condition is typical of Brazil. These shops take the place of large specialized factories in the United States and Canada, and even in the building of a house there is practically no factory work employed, all requirements in the form of window sashes, doors, etc., being, as a rule, made on the premises.

Only a few articles have been dealt with in this report, but enough to show that there is a large market here for Canadian products of every description providing direct, cheaper and regular transportation can be obtained. Canadian goods are recognized here as second to none, and they only require to be placed on the market at a reasonably competitive price when they will meet any competition.

ESSENTIALS FOR CANADIAN SUCCESS IN THE BRAZILIAN MARKET

Canadian products have successfully competed here with American goods in spite of very severe handicaps, which can be set down as: lack of direct and regular shipping, parcel post, tariff preference, selling organization. There are no branches of Canadian firms in Brazil. Canadian goods are firmly established in this market, and with some relief from the handicaps under which our exporters have laboured as compared with those of the United States Canadian trade should jump to two or three times its present size.

Two Canadian banks, the Royal Bank of Canada, and the Canadian Bank of Commerce, have displayed that courageous spirit of the pioneers, without which nothing worth while was ever won, by establishing branches in Brazil. A few of the largest Canadian firms would do well to follow their example. Two Canadian manufacturers have made a step in the right direction by placing stocks of their products in Brazil, but even this is not going far enough. A Canadian trading or merchant company should be formed similar to the score of British merchant houses established in Brazil. It is through the efforts of these organizations, which are to be found in every port and city of size throughout the world, that Great Britain sells her products. Half a dozen of the largest manufacturers in Canada should combine to form a merchant house representing such products as cement, chemicals, paper, iron and steel, machinery, tools, fish, flour and rubber goods. A first-class man of tried ability and an expert in his line should be appointed for each of the products mentioned, one of them to be the manager. The executive of the company would therefore consist of some half-dozen Canadians, each of whom had spent some years with the manufacturer who was sending him to Brazil. A representative from a Canadian exporting and importing company should also be included. As the first object of this group would be to pay its way and make profits, it would have to be given a free hand as to whose products it bought and sold. If for example the paper expert found he could not supply a contractor with Canadian paper owing to its high cost, he should be at liberty to supply any foreign make he chose if he had the opportunity. He is thus not only able to make profits and keep the house going, but also to keep himself thoroughly conversant with the market so that he is in a position to sell Canadian paper the moment the opportunity presents itself. The fact that he is a patriotic Canadian paper man will be sufficient safeguard that he will sell Canadian products if they can be sold. Such an organization would ensure the coming of Canadian ships and so clear the road for other Canadian products.

If such a group were to arrive in Rio de Janeiro, its members would not find themselves amongst strangers. There are located here, as has been said above, the branches of two Canadian banks, the Brazilian Traction and the Canadian Trade Commissioner, all of whom would be found ready and willing to assist in every possible way.

The writer is permitted by both Canadian bank managers to say that in their opinion some practical course of such a nature as described above must be followed by Canadian manufacturers in view of the enormous efforts made by other countries, if success is to be attained in this market.

PROBABLE INCREASE IN PRICES OF BRUSHES

The British Brush Manufacturers' Association announces that a substantial increase in prices is inevitable in the near future in the case of nearly all household and domestic brushes. The prices of all fibres from which these brushes are made are very much higher, while there is almost a famine in Chinese bristles on account of shortage of supplies due to the disturbed conditions in China, the price of some of the bristles being more than double that of a year ago.

EXPORTS FROM THE RUHR DISTRICT OF GERMANY

Mr. Harrison Watson, Canadian Trade Commissioner in London, has sent the following cable with reference to exports from the Ruhr District in Germany: "Applications licenses Ruhr dealt with by British High Commissioner Coblenz, but cease 30th June and refer only to goods ordered before 20th February. Canadian High Commissioner willing to transmit applications."

A summary of the regulations was published in *Commercial Intelligence Journal* No. 1004 (April 28, 1923).

MARKETING AREAS IN THE NETHERLANDS EAST INDIES

TRADE COMMISSIONER A. B. MUDDIMAN

Singapore, May 25, 1923.—It was during the war, when many new trade developments took place in the Far East, that Canada can be said to have opened up commercial relationship with the important markets of the Netherlands East Indies. To maintain her place in this trade to-day, keen competition has to be faced. It will be necessary for Canadian exporters to show aggressiveness to establish permanent connections, to ship goods adapted to local needs, and to make personal visits to this area. The Netherlands East Indies islands are still, to a great extent, unknown commercially among the manufacturers and the people generally of Canada.

Lying just off the main route between India and the China seas, situated along the Equator between the southeast corner of Asia and Australia, the island empire of the Netherlands East Indies offers a large marketing field. It is rich in tropical resources, with a climate not unlike that of Central America. The journey by sea from Sabang in the north of Sumatra to Merauke in New Guinea is about 3,000 nautical miles, or more than the distance from England to America.

The largest islands are Java with Madura, Sumatra, Borneo, Celebes, New Guinea; Borneo and New Guinea are only partly Dutch. Java and Madura together cover an area of 131,508 sq. km., or about that of New York State; Sumatra, with adjacent islands (420,384 sq. km.), is about as large as California. The island of Borneo (736,500 sq. km.) is about as large as Cape Colony, while Dutch Borneo (553,341 sq. km.) is approximately as large as France; Celebes, with the adjacent islands (185,914 sq. km.), is about the same size as New Zealand and Ceylon; Dutch New Guinea (397,204 sq. km.) is about as large as Japan. Besides these are innumerable smaller islands, such as the so-called Little Sunda Islands, the Moluccas, etc., so that the total land area amounts to almost 2,000,000 sq. km., i.e. about as great as half of Europe without Russia.

The population of the Netherlands East Indies is nearly 50,000,000. The population of some of the islands is not large; but in the Island of Java, the centre of government and civilisation of this island empire, it is about 35,000,000, with a density per square mile as great as anywhere in the world.

The following table does not give the population of New Guinea, as the figures are not available.

	Natives	Foreign Orientals	Europeans (Whites of all Nationalities)
Java and adjacent islands	34,462,751	419,237	135,216
Sumatra and adjacent islands	5,949,961	324,726	20,085
Borneo and adjacent islands	1,533,266	88,636	3,551
Celebes and adjacent islands	3,056,040	27,160	6,063
The Moluccas and adjacent islands	413,826	5,608	3,350
Lesser Sunda Islands	2,696,862	13,719	1,090
Total	48,112,706	879,086	169,355

Grand Total: 49,161,047

THE POPULATIONS OF TWENTY PRINCIPAL TOWNS

	Europeans	Natives	Chinese	Other Orientals	Total
Batavia..	24.540	186,837	38,978	3.463	253,818
Bandoeng..	9,043	79,017	6,495	245	94,800
Cheribon..	971	25,339	5,451	1,290	33,051
Semarang..	10,151	126,628	19,727	1,530	158,036
Sourabaya..	17,497	148,411	22.118	4,164	192.190
Malang..	3,504	35,165	3,853	459	42,981
Magelang..	2,803	29,968	3,328	114	36,213
Djokjakarta..	3,730	92,254	5.643	84	103,711
Sourakarta..	2,441	123,005	7,979	860	134,285
Madioen..	1,285	28,078	2,171	59	31,593
Kediri..	774	39,379	3,043	26	43,222
Padang..	1,979	28,754	6.272	1,164	38,169
Palembang..	998	60,720	8,897	3,021	73,726
Medan..	3,128	23,823	15,916	2,381	45,248
Pontianak..	425	19,074	8,901	331	28,731
Singkawan..	126	2,194	3,120	139	5,579
Bandjermasin..	752	41,661	3,207	1,373	46,993
Menado..	1,047	12,229	3,408	378	17,062
Macassar..	2,742	44,605	9,030	341	56,718
Amboina..	1,489	8,581	535	515	11,120
Tjilatjap..	500	17,105	1,331	55	18,991
Toeloengagoeng..	314	28,709	1,956	27	31,006
Blitar..	511	17,512	1,716	15	19,754

For administrative purposes the Government has divided these islands into two broad divisions. The first includes the islands of Java and Madura. The second division embraces the whole of the remainding isles, known as " the Buiten Bezittingen " or " Outer Possessions ". This division is far more than merely administrative, for the two divisions in question are also two distinct trade areas. Trading with Java is quite a different thing from trading with the Outer Possessions. Java is not a semi-civilized territory, but a densely populated island whose native races are progressive, and whose European element for this part of the world is relatively large. On the other hand, some of the Outer Possessions are almost unknown lands, as yet practically unopened to western enterprise.

In each of these two administrative divisions or main trade areas there are three trade divisions. In Java, the three divisions are East, Central and West Java. East Java has its distribution centre at the port of Soerabaya. This division not only includes East Java itself, but the Islands of Bali and Lombok, with the southern part of Borneo. Central Java should be worked from the ports of Samarang, for its eastern end, and Cheribon for its western end. West Java is based on the well-known port of Batavia (known as Tandjong Priok) and includes as a distribution point, in addition to the west of the main island, the south of Sumatra and the tin-mining islands of Banka and Billiton. In the Outer Possessions Macassar is the centre of the Eastern Archipelago trade. The Eastern Archipelago consists of the Celebes, Menado, the eastern part of southeast Borneo, Amboina, the Northern Moluccas, Dutch New Guinea and Timon. This is, of course, the largest territory, and the least developed and the least populated. It offers great potentialities for future exploitation rather than trade. The remaining two divisions are the east and west coasts of Sumatra respectively. The traffic of the west coast also includes Bankoeln and has its centre in Padang. That of the east Sumatran coast is based on Medan, and should therefore be known as the Medan area. With this area and part of Western Borneo, the English merchant houses and the Chinese traders of Singapore and Penang do a fair business.

As in the case of all groups of islands, there are strategic centres from which imported products are radiated over a fixed area. This condition is not very dissimilar from the one prevailing in a field much better known to Canadian traders, that of the West Indies. Further, in the Netherlands East Indies, it must be remembered that certain kinds of Colonial produce trade are

limited to certain distinct areas. The tobacco industry of Sumatra, for example, is in the Medan area, while there is a petroleum area around Palembang. In Java, the sugar area is essentially East Java. From where do the tin mines of the Islands of Banka and Billiton draw their supplies? Where is the centre of the bird of Paradise traffic? To what part of Java are the tea chests shipped? These, and a hundred more geographical questions of trade distribution, are of supreme interest to the well-informed, that is, the successful exporter to this area.

The main factor to be borne in mind is the distinction between the administration of Java and that of the Outer Possessions. Very wisely, for statistical purposes, the import and export figures of these two fields have been tabulated separately by the Government of the Netherlands East Indies Archipelago, consequently the study of the demand for any particular commodity in these distinct markets is at once simplified. The war to a certain extent broke up the close commercial control that Holland maintained over the Netherlands East Indies. The shipping lanes of the Mediterranean were closed and cut off from their usual markets, and trade of the Netherlands East Indies turned instictively to Australia, Japan, the United States and Canada. As a result of this trade deflection, merchants in the Netherlands East Indies began to realize that by selling their products as hitherto, through Europe, they were not only deprived of direct contact with good markets, but were also actually paying excessive freight charges and high discount rates. With the return of peace and the disappearance of American banks, and direct European steamship lines again established, the element in the community whose connection with the mother country naturally desired to return to the pre-war channels, has to a certain extent withdrawn trade from Canada. However, the market still exists in this area, and there is a good market for direct trading between Canada and the Netherlands East Indies, for the interest awakened in Canadian products that arrived in Java during the war has not disappeared. It is to the interest both of Canada and of the Netherlands East Indies to obtain this direct trade movement, as the products of the two countries are largely complementary. Briefly the advantages to Canada are: (1) the opening up of a really rich and densely populated market in Java, and a potential one in the future in the Outer Possessions; (2) direct sources of supply for tropical produce required in Canada. Among such tropical produce can be included sugar, rubber, coffee, tobacco, cocoa, cinchona bark, black and white pepper, tea, palm oil, kapok, tapioca, ground nuts, iodine, quinine, tin, diamonds, etc. The increasing demand for manufactured goods is very evident when one glances at the following figures for the total value of imports for private account for the whole of the Netherlands East Indies for the years 1913 to 1920:—

In Millions of Guilders

Year.	Java.	Other Islands.	Total.
1913	300.1	137.5	437.6
1914	262.4	120.7	383.1
1915	260.0	112.3	372.3
1916	287.1	115.7	402.8
1917	310.6	154.1	464.7
1918	363.8	165.1	528.9
1919	423.1	214.9	638.0
1920	812.3	303.9	1,116.2

These statistics simply confirm the possibilities, and Canada, through lack of direct contact with such a rich field, does not benefit to the fullest extent possible. Again, it is self-evident that with the growth of Canada, the demand for tropical products must increase. In the production of cane sugar, the Netherlands East Indies rank second only to Cuba, and in many lines of other tropical produce they are among the world's chief sources of supply. The

steady increase in the value in the Netherlands East Indies exports can be traced by comparing the following official statistics for the years 1913-1920:—

In Millions of Guilders.

Year.	Java.	Outer Islands.	Total.
1913	317.1	297.1	614.2
1914	335.5	300.2	635.7
1915	432.9	325.3	758.2
1916	511.3	345.4	856.7
1917	457.5	328.6	786.1
1918	353.5	322.4	675.9
1919	1,413.3	748.8	2,162.1
1920	1,501.8	752.2	2,254.0

On this basis therefore, the Canadian manufacturer and exporter will find it to their interest to continue to develop this trade with the Netherlands East Indies in manufactured products. Canada is a good purchaser of sugar, tea, tapioca, etc. She can surely buy cheaper if she can buy direct. But to maintain this trade, like any other in these days of keen competition and profits cut to a minimum, it is essential not to be merely a casual shipper from time to time in the market. Only such relations as are intended to be permanent in exporting to, and importing from, the Netherlands East Indies will succeed in maintaining genuine trade between Canada and these islands. It is true that the competition is keen, and that only firms which can and will compete against anyone else should dream of entering this field. As all foreign manufacturers enter these markets with equal chances of success, and with no Preferential Tariff and no local favour for goods made in any particular country (as there is in British Malaya for English-made goods), there should be no reason why the trade Canada built up during the war should not be retained in accordance with peace needs. The secret of success for any exporter lies in a personal visit to these countries where conditions are so different from those prevailing in the home markets.

WEIGHTS AND MEASURES ACT OF THE UNION OF SOUTH AFRICA

Assistant Trade Commissioner James Cormack

Cape Town, May 25, 1923.—A proclamation has been published in the *Gazette* of the Union of the South Africa, embodying certain modifications and additions to the Weights and Measures Act with new Regulations thereunder. The subjoined notes refer to those sections more particularly affecting Canadian exporters and may be read as supplementary to the report which appeared in *Commercial Intelligence Journal* No. 980 (November 11, 1922) on the same subject.

Grains.—A sack or bag of the following commodities shall be of the weights stated, viz.: Barley, 150 lbs.; maize flour, 180 lbs.; rye meal, 200 lbs.; oats, 150 lbs.; crushed oats, 100 lbs., and wheat, 200 lbs.

Additional weights.—The use of the word "hundredweight" (cwt.) is discontinued and "cental" (100 lbs.) substituted. The following additional denominations are added to the Act: the half cental weighing 50 lbs. and the quarter cental of 25 lbs. In respect of weight assized or in use prior to 1st January, 1924, the weights 16 lbs., 7 lbs. and 4 lbs. are permitted.

Liquid Measures.—The following additional denominations are given: (*a*) 3 pints, (*b*) $\frac{5}{6}$ gallon—when indicating net contents of tins of paraffin or gasoline, and (*c*) $4\frac{1}{2}$ gallons for net contents of paraffin tins.

Sale by Net Weight Only.—Exceptions to sections 20, 40, 244 of the Act, which provide for marking and sale by net weight only, are detailed as follows:—

1. Any article which, by reason of its being subject to variation in weight owing to climatic influences, is specially exempted by regulations from the provisions of this section. Every article so exempted, when sold or offered for sale, shall be conspicuously marked on the cover or package in which it is sold or offered for sale with a statement giving the net weight of the contents at the time of packing.
2. Any article for which weight is used for the purpose of designating grade or class only.
3. Any article which for any reason is specially exempted by regulation from any or all of the provisions of this section.

In addition, it is not now necessary to have the net weight marked on the outside of the package, when goods are "weighed at the time of sale and sold by the net weight determined by such weighing."

WEIGHTS AND MEASURES REGULATIONS, 1923

Goods in Standardized Packages or Containers.—No person shall, save as herein provided, sell at any place or make up, pack, or keep for sale or delivery to a purchaser at any mill, factory, or place, enclosed in a bag, package, or other container, any article for which a scale of quantities is prescribed in subsection (2) of this regulation, unless the net weight of such article is in accordance with such scale of quantities.

Ss. 2. The standard weights of the contents of bags, packages, or other containers shall be,—

(*a*) For butter, butter substitute, margarine and lard: 8 ounces, 1 pound, or an integral number of pounds.
(*b*) For cocoa, coffee and tea: 1 ounce, 2 ounces, 4 ounces 8 ounces, 1 pound, or an integral number of pounds.
(*c*) For flaked oats, oatmeal, macaroni, vermicelli, spaghetti: 8 ounces, 1 pound, or an integral number of pounds.
(*d*) For condensed milk, sweetened: 6 ounces, 14 ounces; for condensed milk, unsweetened: 12 ounces, 1 pound, or an integral number of pounds.
(*e*) For jam, syrup and treacle: 8 ounces, 1 pound, or an integral number of pounds.
(*f*) For corn flour and self-raising flour: 4 ounces, 8 ounces, 1 pound, or an integral number of pounds.
(*g*) For flour and boer meal: 5 pounds, 10 pounds, 25 pounds, 50 pounds, 100 pounds, and 200 pounds.
(*h*) For salt in bags: 5 pounds, 10 pounds, 25 pounds, 50 pounds, 100 pounds, and 200 pounds.
(*i*) For sugar in bags, 50 pounds and 100 pounds; for sugar in packages, 8 ounces, 1 pound, or an integral number of pounds.

This regulation shall not apply to fancy jam, loaf sugar, salt in tins, or to any article taken from bulk and weighed at the time of sale.

This regulation shall not have effect in respect of paragraphs (*b*) and (*h*) until six months from the date of the regulations (May 4, 1923), and in respect of paragraphs (*c*) (*d*) (*e*) (*f*), and (*i*) until twelve months from such date.

No person shall sell, keep, offer, or expose for sale at any place or make up for sale at any mill, factory, or place in a bag, package, tin, or other container any article beforementioned, unless such bag, package, or other container has the net weight of its contents marked in the manner provided by regulations. This regulation shall not apply to bags containing 200 pounds of boer meal or flour, to bags containing 50 pounds or 100 pounds of sugar, or to any article for export which is marked in the manner provided by regulation.

Lime and Cement.—Ss. 1. No person shall sell or offer for sale any cement or lime otherwise than by weight.

2. The standard weight of a bag or other container of the articles specified in sub-section 1 of this regulation shall be:—

Cement in bags	187 lbs.	Lime, white, unslaked	200 lbs.
Cement in casks	375 lbs.	Lime, white, slaked	180 lbs.
		Lime, blue	160 lbs.

No person shall, save as otherwise provided, sell, make up, keep, offer or expose for sale at any place or deliver to a purchaser, any article specified in sub-section (1) of this regulation, in a bag or other container which contains less than the standard weight of such article.

No person shall be liable to a penalty for delivering to a purchaser a less quantity than the standard weight of any such article, in a bag or other container to which is attached a label stating clearly the weight contained in such bag or container, provided that not more than one such bag or container is delivered to such purchaser in any one delivery.

Soap.—No person shall pack or make up for sale at any factory or place, nor shall any person import into the Union for the purposes of sale, any soap other than (*a*) tablet soaps, and (*b*) soap preparations not being in the form of bar soap or soft soap, otherwise than as hereinafter in these regulations provided. Bar soaps shall be packed in cases which,—

(1) contain 50 pounds or 100 pounds of soap at the time such soap is packed;
(2) contain counts of 15, 20, 25, 30 or 40 bars of soap of not less than 14 inches in length to each case of 50 pounds and twice such number of counts to each case of 100 pounds;
(3) have the words "not weighed when packed" marked on each such case in the manner provided by regulation.

Soft soap shall be packed and sold in tins which contain 1 pound or an integral number of pounds and which have the weight of the contents marked on the tin or label.

Soaps of all kinds made to specifications for use by laundries, wool-washers, and manufacturers, which are for use and not for resale by retail, shall be sold at the net weight of such soaps when packed for sale.

Fertilizers.—No person shall
(1) sell, keep, or offer or expose for sale at any place any artificial fertilizer other than fertilizer in liquid form, otherwise than by weight; (2) pack, or make up for sale at any factory or place or sell or deliver to a purchaser, any artificial fertilizer in a bag on which the net weight of the contents is not clearly marked in the manner provided.

Agricultural Produce.—No person shall sell barley, bran, beans, corn, fodder, meal nuts, oats, onions, peas, potatoes, rye, wheat, or other cereal or manufacture thereof, otherwise than by weight, except when in the green stage.

Spirits, Oils and Varnishes.—No person shall (*a*) sell motor spirit, benzine, paraffin, creosote, methylated spirits, turpentine, turpentine substitutes, vinegar, linseed oil, salad oil, olive oil, or any lubricating oil, or varnish, otherwise than by measure of capacity except when in bottles or tins containing less than 5 fluid ounces.
(*b*) This regulation shall not have effect until twelve months from the date of these regulations (May 4, 1923).

Exemptions.—The provisions of section forty-four (*re* selling by and marking net weight) of the Act, shall not apply to,—

(*a*) carbonate of soda, washing soda, or glauber salts;
(*b*) cases containing bar soap;
(*c*) cheese in original wrapping material;
(*d*) hams, bacon, or sausage skins when packed in preserving materials;
(*e*) leather when sold by weight;
(*f*) tobacco made up in bags or other containers for sale by retail;
(*g*) treacle sugar;

provided that such package, container or case containing any such article has the words "net weight when packed" marked thereon in the manner provided.

Save as otherwise provided, the following articles shall be exempt from the provisions of paragraph (*c*) of section forty-four of the Act,—

(*a*) A bag of any cereal or manufacture thereof;
(*b*) any article which, having been taken from bulk and put into a bag or other container, is weighed at the time of sale;
(*c*) cement or lime;
(*d*) any article made up or packed for export when marked in the manner provided by regulations;
(*e*) coal or coke in bags;
(*f*) flour in bags containing 200 pounds of flour.
(*g*) sugar in bags containing 50 pounds or 100 pounds of sugar.

The provisions of section forty-three of the Act shall be applied to any liquid sold in bottles or other containers in quantities of less than five fluid ounces.

Scales, Weights and Measures.—The regulations affecting the types of above articles permitted to be used in the Union of South Africa are too involved and lengthy to be incorporated here. Canadian manufacturers of these articles are referred to the text of the Regulations on file at the Department of Trade and Commerce, Ottawa.

BRITISH PREFERENTIAL TARIFFS APPLICABLE TO BOOTS AND SHOES OF CANADIAN ORIGIN*

(Compiled by the Foreign Tariffs Division, Commercial Intelligence Branch)

The rates of duty given below in the column headed "British preferential tariff" apply to Canada and the United Kingdom. In addition, the British preferential rates in some cases apply to all other parts of the Empire or to certain specified portions of it. The general tariff is applicable to goods, the origin of any country outside the British Empire. The statement does not take into account goods imported for special purposes, for example, naval and military supplies, and for which provision may be made for exemption from duty in particular Dominions or colonies.

NEW ZEALAND	British Preferential Tariff	General Tariff
Leather laces; vamps, and uppers; leather cut into shapes; clog and patten soles; leather leggings.......................*ad val.*	25 per cent	45 per cent
Boots, shoes, shoettes, sandals, clogs, and pattens, slippers, and goloshes—namely, children's Nos. 0 to 6..............*ad val.*	Free	20 per cent
Boots, shoes, shoettes, sandals, clogs, and pattens, slippers and goloshes—namely, children's Nos. 7 to 9..............*ad val.*	Free	20 per cent
Boots, shoes, clogs, pattens, slippers, shoettes, sandals, goloshes, overshoes, and other footwear, not elsewhere included in the New Zealand tariff..................................*ad val.*	25 per cent	45 per cent
Gum boots, half-knee, knee, or thigh, with soles either of leather or of rubber, and measuring not less than 9½ in. from the lowest point reached by the line of the top of the upper to a horizontal surface of which the boot is placed.........*ad val.*	Free	20 per cent

There is a primage duty of one per cent *ad valorem* in addition to the rates quoted.

UNION OF SOUTH AFRICA		
Boots and shoes..*ad val.*	27 per cent	30 per cent

(From proposals made in the House of Assembly March 28, 1923. Proposed rate went into force at once.).

*While an effort is made to obtain the latest and most reliable information on customs duties in force in other countries, it is not practicable, mainly in view of the tariff changes that are being constantly made and on account of possible difficulties which may arise in interpreting tariffs to guarantee that information published on this subject is in every instance up-to-date and absolutely correct.

NORTHERN RHODESIA (EXCEPT CONGO BASIN) AND SOUTHERN RHODESIA	British Preferential Tariff	General Tariff
Boots and shoes....ad val.	9 per cent	20 per cent
With a minimum per pair of:		
Men's....		9d.
Women's....		6d.
Children's....		3d.
Infants' shoes and bootees are not included in the foregoing item and are apparently dutiable as unenumerated goods at....ad val.	9 per cent	15 per cent or 20 per cent
BRITISH WEST INDIES		
Barbados.—Boots, shoes, and slippers....ad val.	12 per cent.	24 per cent
British Honduras.—Boots, shoes, and slippers....ad val.	10 per cent	20 per cent
Trinidad.—Boots, shoes, and slippers....ad val.	10 per cent	20 per cent
Grenada.—Boots, shoes, and slippers....ad val.	12½ per cent	18¾ per cent
St. Lucia.—Boots, shoes, and slippers....ad val.	10 per cent	15 per cent
St. Vincent.—Boots, shoes, and slippers....ad val.	11 per cent	16½ per cent
Dominica.—Boots, shoes, and slippers....ad val.	10 per cent	15 per cent
British Guiana.—Footwear apparently duitable as unenumerated goods....ad val.	16⅔ per cent	33⅓ per cent
Antigua.—Footwear apparently duitable as unenumerated goods....ad val.	10 per cent	15 per cent
St. Kitts-Nevis.—Footwear apparently dutiable as unenumerated goods....ad val.	10 per cent	15 per cent
Montserrat.—Footwear apparently dutiable as unenumrated goods....ad val.	10 per cent	15 per cent
Virgin Islands.—Footwear apparently dutiable as unenumerated goods....ad val.	8 per cent	12 per cent
Jamaica.—Footwear apparently dutiable as unenumerated goods....ad val.	15 per cent	20 per cent
Bahamas.—Footwear apparently dutiable as unenumerated goods....ad val.	18¾ per cent	25 per cent
Under a tariff amendment act of 1920, which has since been renewed from year to year, a drawback of 50 per cent of duties is allowed, which would reduce by half the rates quoted, both preferential and general.		
CYPRUS		
Footwear apparently dutiable as unenumerated goods....ad val.	⅚ of full rate	10 per cent
FIJI		
Boots, shoes, slippers, and goloshes....ad val.	15 per cent	27½ per cent
SAMOA (MANDATED TERRITORY)		
Footwear apparently dutiable as unenumerated goods....ad val.	15 per cent	22½ per cent

TENDERS INVITED

Australia

Copies of tender forms and specifications have been received from Trade Commissioner D. H. Ross, Melbourne, for material and equipment required by the Victorian Government Railway Department, and for printing and writing paper, etc., required by the Commonwealth Government and the Victorian Government, Melbourne.

These tender forms and specifications are open to the inspection of interested Canadian manufacturers at the Department of Trade and Commerce, Ottawa.

Tenders in conformity with the specifications should be promptly addressed, respectively, to the Secretary, Victorian Government Railways, Melbourne; the Commonwealth Controller of Stores, General Post Office, Melbourne; and to the Secretary, Victorian Tender Board, Melbourne, Australia.

Particulars of the requirements are briefly outlined thus:—

VICTORIAN GOVERNMENT RAILWAYS

No.	Date of closing	Particulars.
35978	July 11, 1923	Supply and delivery of 100,000 lineal yards of tarpaulin canvas in bolts, as specified.
35682	August 8, 1923	Manufacture, supply and delivery of 14,046 tons of railroad rails, 60 pounds per yard, and 960 tons of fishplates for same, to drawings and as specified.
35946	August 8, 1923	Supply and delivery of 10 sets of electric air brake equipment, with spares, as specified
35965	August 8, 1923	Supply and delivery of 700 solid drawn steel boiler tubes, as specified.
35966	August 8, 1923	Supply and delivery of 15 best steel fire-box plates, as specified.

COMMONWEALTH GOVERNMENT

28865	July 24, 1923	Supply and delivery of printing and other paper, etc., for government requirements, as specified.

VICTORIAN GOVERNMENT

1	July 24, 1923	Supply and delivery of printing and other paper, etc., for government requirements, as specified.

New Zealand

Copies of specifications have been received from Mr. W. A. Beddoe, Canadian Trade Commissioner at Auckland, N.Z., for equipment for the Public Works Department and the Post and Telegraph Department, Wellington. These specifications are open for inspection at the Department of Trade and Commerce, Ottawa. Tenders should be addressed to the Secretary, Public Works Supplies and Tenders Committee, Wellington, and the Stores Manager, Post and Telegraph Department, Wellington, in accordance with these specifications.

PUBLIC WORKS DEPARTMENT

No.	Date of closing	Particulars.
S.M.	July 31, 1923	Waihou and Ohinemuri rivers improved scheme, as specified.
167		Electrical equipment for Dredge No 2.

POST AND TELEGRAPH DEPARTMENT

C.S.	July 23, 1923	Blue pencils, as specified (sample on file).
178/ 433, 392, 5626		Paper supplies and envelopes as specified (samples on file).

WOOL CLIP OF HUNGARY

It is estimated that this year's clip of wool in Hungary will approximate 5,000 tons. Of this quantity only about 2,000 tons will be required by Hungarian textile mills, but in order to ensure a sufficient supply the export will be restricted to about 1,500 or 2,000 tons, for which quantity export permits are now being issued. The British Commercial Secretary at Budapest is informed that owing to the unexpected imposition of the export prohibition last year large supplies of wool were left in the country, and it is therefore not unlikely that at least 2,000 tons will be available for export.

FOREIGN EXCHANGE QUOTATIONS FOR THE WEEK ENDING JUNE 26, 1923

The Foreign Exchange Department of the Bank of Montreal has furnished the following statement of the nominal closing quotations for all the principal exchanges for the week ending June 26, 1923. Those for the week ending June 19 are also given for the sake of comparison.

		Parity	Week ending June 19, 1923	Week ending June 26, 1923
Britain.. .. .. £	1.00	$4.86	$4.7311	$4.7249
France.. .. ..Fr.	1.	.193	.0657	.06284
Italy.. .. ..Lire.	1.	.193	.0476	.0454
Holland.. .. ..Florin.	1.	.402	.4013	.4016
Belgium.. .. ..Fr.	1.	.193	.0542	.0536
Spain.. .. ..Pes.	1.	.193	.1520	.1517
Portugal.. .. ..Esc.	1.	1.08	.0485	.0486
Switzerland.. .. ..Fr.	1.	.193	.1836	.1824
Germany.. .. ..Mk.	1.	.238	.000008	.000007
Greece.. .. ..Dr.	1.	.193	.0306	.0332
Norway.. .. ..Kr.	1.	.268	.1698	.1693
Sweden.. .. ..Kr.	1.	.268	.2716	.2715
Denmark.. .. ..Kr.	1.	.268	.1832	.1821
Japan.. .. ..Yen	1.	.498	.5050	.5029
India.. .. ..R.	1.	2s.	.3196	.3201
United States.. .. ..$	1.	$1.00	1.0228	1.0243
Mexico.. .. ..$	1.	.498	.4967	.4973
Argentina.. .. ..Pes.	1.	.424	.3669	.3649
Brazil.. .. ..Mil.	1.	.324	.1086	.1114
Roumania.. .. ..Lei	1.	.198	....	....
Jamaica.. .. .. £	1.	4.86	4.7432	4.776
British Guiana.. .. ..$	1.	1.		
Barbados.. .. ..$	1.	1.		
Trinidad.. .. ..$	1.	1.		
Dominica.. .. ..$	1.	1.		
Grenada.. .. ..$	1.	1.	.9703—.9985	.9693—.9987
St. Kitts.. .. ..$	1.	1.		
St. Lucia.. .. ..$	1.	1.		
St. Vincent.... .. ..$	1.	1.		
Tobago.. .. ..$	1.	1.		
Shanghai, China.. .. ..Tael	1.	.708	.7517	.7401
Batavia, Java.. .. ..Guilder	1.	.402	.3912	.3905
Singapore, Straits Settlements...$	1.	.567	.5587	.5587

PRODUCTION OF CEMENT IN FAR EASTERN ASIA

Cement is manufactured in several districts in China, and is exported, but at the present time her imports of this material, principally from Japan, are much larger than her exports. This, however, is a condition which should not exist for long, as China has an enormous wealth of cement-making materials, and in many districts the three necessary elements—clay, limestone and coal—are found together. According to *Finance and Commerce* (Shanghai), the bulk of China's exports goes to the Philippines, smaller shipments being made to the Dutch East Indies and to Hong Kong. In Manchuria a very successful cement factory is in operation, and export shipments are made through the port of Dairen to Korea and Siberia, and are developing in importance. Japan has several large and modern plants, the total output of which is much larger than that of the Chinese mills. From an output of 1,800,000 barrels in 1908 the production had grown to 6,500,000 barrels in 1919, and the value of exports in the latter year reached more than 6½ million yen. In French Indo-China there is a factory which is producing high-grade cement in considerable quantities, about one-tenth of which is consumed in Indo-China, and in the Philippines the manufacture of the product has been started, the output totalling at present approximately 10,000 barrels annually. Of the cement which is shipped from Japan, China is the largest purchaser, other important customers being Korea, Manchuria, the Philippines, Straits Settlements and Dutch East Indies.

OCEAN MAIL SERVICES

With mails for	*Steamer*	*Sailing from*	*Date*
Great Britain and Countries via Great Britain.	†*Mauretania*	New York	July 10
" " "	*Montlaurier*	Quebec	July 13
" " "	*Megantic*	Montreal	July 14
" " "	†*Berengaria*	New York	July 17
" " "	-*Melita*	Montreal	July 18
" " "	†*Paris*	New York	July 13
" " "	*Montclare*	Montreal	July 20
" " "	*Empress of France*	Quebec	July 21
" " "	*Doric*	Montreal	July 21
Ireland only	‡*Marburn*	Montreal	July 19
France	**Ausonia*	Montreal	July 21
Union of South Africa	**Cochrane*	Montreal	July 15
Bermuda, Leeward Islands, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad, British Guiana, Venezuela	*Chaleur*	Halifax	July 20
St. Kitts, Antigua, Barbados, Trinidad, Br. Guiana	**Canadian Carrier*	Montreal	July 11
Bermuda, Bahamas, Jamaica, Colombia, British Honduras	**Canadian Forester*	Montreal	July 27
Cuba, Jamaica and Colombia	**Ottar*	Halifax	July 11
China and Japan	*Empress of Russia*	Vancouver	July 12
" "	*President Jackson*	Victoria	July 13
" "	*Shidzuoka Maru*	Victoria	July 16
" "	*Hawaii Maru*	Victoria	July 18
Australia and New Zealand	‡*Tahiti*	San Francisco	July 20
Australia only	‡*Ventura*	San Francisco	July 31

† Letter mail only. * Parcel Post and specially addressed correspondence only.

‡ Letter and paper mail only. - Papers, Parcel Post and specially addressed correspondence only.

NOTES.—The *Melita* will also be used for direct mail for the Continent, including direct Parcel Post to France. *Re* despatch July 21—Quebec City and Maritime Provinces will despatch via *Empress of France*, which will also be used for direct mail for the Continent. Montreal and West will despatch via *Doric*. All direct Parcel Post to France will be forwarded by the *Ausonia*.

TRADE INQUIRIES FOR CANADIAN PRODUCTS

Since the publication of the last *Commercial Intelligence Journal* there have been received the following inquiries for Canadian products. The names of the firms making these inquiries, with their addresses, can be obtained only by those specially interested in the respective commodities upon application to: "THE COMMERCIAL INTELLIGENCE BRANCH OF THE DEPARTMENT OF TRADE AND COMMERCE, OTTAWA," OR THE BOARDS OF TRADE AT ST. JOHN, HALIFAX, QUEBEC, SHERBROOKE, MONTREAL, PETERBOROUGH, TORONTO, WOODSTOCK, ST. MARY'S (ONT.), WINNIPEG AND VANCOUVER; THE CHAMBERS OF COMMERCE AT HAMILTON, ST. CATHARINES, STRATFORD, BRANTFORD, LONDON, AND VICTORIA (B.C.); BORDER CHAMBER OF COMMERCE, WINDSOR; THE CANADIAN MANUFACTURERS' ASSOCIATION OFFICES AT TORONTO, MONTREAL, WINNIPEG, VANCOUVER AND VICTORIA; AND THE KITCHENER AND WATERLOO MANUFACTURERS' ASSOCIATION, KITCHENER, (ONT.).

Foodstuffs

1799. FLOUR.—A Japanese import firm ask to be put in touch with Canadian mills in a position to supply flour to this market.

1800. PROVISIONS.—A Hamburg firm desire to establish connections with Canadian exporters of provisions, canned goods, etc.

1801. OLEOMARGARINE.—An important provision house in Osaka, doing a wholesale import business, desires to hear from Canadian packers in a position to supply first-class oleamargarine. Samples and prices requested.

1802. CANNED VEGETABLES.—An importing firm in Hong Kong would like to receive samples and quotations c.i.f. and f.o.b. on canned asparagus (white), tomatoes, peas and beans.

1803. CANNED FRUIT.—An importing firm in Hong Kong would like to receive samples and quotations c.i.f. and f.o.b. on canned pears, peaches, apricots, plums and cherries.

1804. WHEAT.—A commission house in Kobe, interested in the import of wheat, desire to hear from Canadian shippers in a position to supply Nos. 2 and 3 Northern, sacked.

1805: Provisions; Ores.—Large import-export merchants of Antwerp wish to hold Canadian agencies for cereals in general, grains, hay, lard and salted meats, live cattle and abattoir products; also ores.

Miscellaneous

1806. Bond, Book and Foolscap Paper.—Merchant firm in Hong Kong would like to receive samples and quotations c.i.f. and f.o.b. on bond paper and foolscap.

1807. Glassine Paper.—An old-established Japanese concern in Osaka desire to receive samples and prices from Canadian mills in a position to supply 20 tons monthly glassine paper of the following specifications, now supplied from Sweden: 20 inches by 30 inches by 12 pounds (500 sheets); 20 inches by 30 inches by 14 pounds (500 sheets). Samples on file.

1808. Typewriter Paper.—A firm in Calcutta, buying direct, would like to hear from Canadian manufacturers who can supply at competitive prices typewriter paper double foolscap (17 by 26 inches), medium (18 by 23 inches), typewriter manifold paper, and double crown manila for envelopes (20 by 30 inches), in ton lots of each variety.

1809. Old Newspapers.—A firm in Hong Kong would like to receive a consignment of a few bales of old newspapers for testing the market. The papers must be bound with three red-coloured steel bands. Total weight 280 pounds per bale. Clean over-issues preferred.

1810. Sealing Paper.—An Osaka firm desire to receive samples and prices of sealing paper.

1811. Kraft Wrapping Paper.—An Osaka firm ask for samples of Canadian kraft wrapping paper, and are in a position to place good business if prices are in line with other Canadian and American suppliers.

1812. Lumber.—A Japanese firm in Kobe, in the lumber business, desire to make new connections with reliable Canadian exporters in British Columbia. Immedate replies, stating exactly what they can supply, in what quantities, and what facilities for shipment.

1813. Lumber.—A Japanese import and export house wish to make connections with Canadian lumber mills exporting to the Japanese market.

1814. Wood-pulp.—A commission house in Tokyo desire to hear from Canadian pulp mills in a position to supply easy bleaching and bleached sulphite pulp to Japan.

1815. Saw Sharpeners.—A firm in Kobe desire to receive catalogues, prices and full particulars regarding a machine for sharpening jig saws.

1816. Wire Nails, Bolts and Nuts.—A Sheffield firm ask for quotations in 10- or 20-ton lots.

1817. Cement; Machinery.—A commission merchant of Havana wishes to represent in the Cuban market, on a brokerage basis, Canadian exporters of cement and machinery.

1818. Metals.—A firm in Hamburg desire to form connections with Canadian firms in a position to offer gold, silver, copper, tin, zinc, nickel, brass, bronze, aluminum, etc.

1819. Mica.—A French firm desire to be put in touch with responsible Canadian exporters of mica, raw and manufactured

1820. Cobalt.—A leading firm of metal brokers in Hamburg are interested in the importation from Canada of cobalt waste or ores low in silver content or free of silver.

1821. Graphite.—A Hamburg firm desire to establish connections with Canadian exporters of graphite.

1822. Ferro-silicon.—A Sheffield firm, buyers of 50 to 150 tons of 10½ per cent, 45/50 per cent, and 70/75 per cent ferro-silicon monthly, ask for quotations c.i.f. Manchester or Hull. Would consider an agency for the above or other ferro-alloys.

1823. Asphalt.—A firm in Tokyo desire to hear from Canadian exporters of asphalt.

1824. Phosphorus, White Sticks and Red.—A leading firm of drug merchants in Hamburg desire to import phosphorus, white sticks and red, in regular quantities, and seek connections with first-hand and absolutely reliable houses.

1824a. Leather.—A reliable firm of exporters and importers in Hong Kong would like to receive samples and quotations f.o.b. and c.i.f. on sole, upper and patent leathers, all grades.

1825. Rubber Gloves.—A Japanese house in Kobe importing rubber gloves from the United States would be glad to receive samples and prices of electricians', household and surgical rubber gloves, together with best c.i.f. prices.

1826. Proprietary Food and Drug Articles.—A London firm possessing warehouse facilities are in a position to undertake additional agencies on a commission basis in goods saleable to these trades, and ask to be placed in communication with Canadian manufacturers of proprietary food and drug articles looking for such connection.

1827. Senega Roots.—A Japanese import firm of good standing in Osaka desire to receive samples and prices from Canadian firms in a position to export Senega root. This firm claim that they have been purchasing this drug from Canada through United States brokers and are very anxious to line themselves up for direct business.

1828. Senega Root, Western.—A leading firm of drug merchants in Hamburg desire to import Senega root, Western, in regular quantities, and seek connections with first-hand and absolutely reliable houses.

1829. Ginseng.—A reliable firm of importers in Hong Kong, which have handled ginseng in pre-war days, would like to secure a small consignment of ginseng as a forerunner to larger business.

1830. Wood Alcohol.—A Japanese firm interested in heavy chemicals desire to receive full particulars from exporters of wood alcohol.

1831. Acetate of Lime.—Canadian manufacturers of acetate of lime of the usual specifications are asked to submit samples and prices to a large Japanese importer.

1832. Electrical Goods.—A manufacturers' representative and commission merchant in Port of Spain, Trinidad, who is also engaged in the electrical contracting business, would like to get in touch with manufacturers of electric lamps and electric house meters.

1833. Household Utensils.—A Hamburg firm are desirous of forming connections with Canadian exporters of household utensils, wringing machines, ice-cream machines, kitchen furniture, etc.

1834. Fertilizers.—A reliable firm of merchants would like to receive samples and quotations c.i.f. and f.o.b. on fertilizers. Salt fertilizers are preferred. Analysis and uses should be given.

1835. Cotton, Woollen and Linen Textiles.—A house in Naples wish to import from Canada.

1836. Cottons.—A firm in Milan would be willing to open up business relations with Canada in cottons and all inherent to this industry.

1837. Woollen and Cotton Textiles.—A Naples concern inquire for Canadian woollen and cotton textiles.

1838. Textiles.—A Roman firm are desirous to import different kinds of textiles from Canada.

1839. Ready-made Clothes.—Ready-made clothes, men's and women's, are requested by an Italian firm.

1840. Woollen Yarn.—An old-established import house in Osaka handling large quantities of yarn annually would be glad to receive samples of weaving, worsted and knitting yarns from Canadian mills in a position to supply this market.

PROPOSED SAILINGS FROM CANADIAN PORTS

Subject to change without notice. The sailing dates are approximate.

From Montreal

To Antwerp.—Minnedosa, Canadian Pacific Steamships, Ltd., July 3; Canadian Challenger, Canadian Government Merchant Marine, July 4; Rawtry, Canadian Pacific Steamships, Ltd., July 7; Hoerda, I.C. Transports, Ltd., July 12; Melita, Canadian Pacific Steamships, Ltd., July 18; Canadian Planter, Canadian Government Merchant Marine, July 18; Seattle Spirit, Rogers & Webb, July 20; Essex County, I.C. Transports, Ltd., July 21; Canadian Commander, Canadian Government Merchant Marine, Aug. 1; Minnedosa, Canadian Pacific Steamships, Ltd., Aug. 1.

To Avonmouth.—Parthenia, Anchor-Donaldson Line, July 7; Caledonian, July 7; Oxonian, July 14—both White Star-Dominion Line; Cabotia, Anchor-Donaldson Line, July 14; Turcoman, White Star-Dominion Line, July 21; Concordia, Anchor-Donaldson Line, July 21; Colonian, July 28; Cornishman, Aug. 4—both White Star-Dominion Line; Salacia, Anchor-Donaldson Line, Aug. 4.

To Belfast.—Metagama, July 5; Marburn, July 19—both Canadian Pacific Steamships, Ltd.

To Belfast and Londonderry.—Lord Londonderry, July 4; Lord Antrim, July 15—both Head Line.

To Cardiff and Swansea.—Canadian Victor, July 4; Canadian Mariner, July 13; Canadian Explorer, July 27—all Canadian Government Merchant Marine.

To Cherbourg.—Minnedosa, Canadian Pacific Steamships, Ltd., July 3; Antonia, Anchor-Donaldson Line, July 7; Melita, Canadian Pacific Steamships, Ltd., July 18; Ausonia, July 21; Andania, July 28—both Anchor-Donaldson Line; Minnedosa, Canadian Pacific Steamships, Ltd., Aug. 1.

To Copenhagen and Baltic Ports.—Florida, Scandinavian-American Line, July 8; Anthony, Sprague Lines, July 15.

To Dublin and Cork.—Lord Londonderry, Head Line, July 4.

To Dundee and Hull.—Ariano, Furness Line, July 14.

To Glasgow.—Metagama, Canadian Pacific Steamships, Ltd., July 5; Athenia, July 6; Saturnia, July 13; Cassandra, July 20; Gracia, July 27—all Anchor-Donaldson Line.

To Hamburg.—Porsenger, I.C. Transports, Ltd., July 7; West Kebar, Rogers & Webb, July 10; Kenbane Head, Head Line, July 15; Grey County, I.C. Transports, Ltd., July 18; Seattle Spirit, July 20; Sinasta, July 31—both Rogers & Webb, Ltd.

To Havre.—Hoerda, July 12; Essex County, July 21—both I.C. Transports, Ltd.

To Hull.—Comino, Furness Line, July 24.

To Liverpool.—Montrose, Canadian Pacific Steamships, Ltd., July 6; Regina, White Star-Dominion Line, July 7; Corinaldo, Cunard Line, July 13; Megantic White Star-Dominion Line, July 14; Montclare, Canadian Pacific Steamships, Ltd., July 20; Lakonia, Cunard Line, July 20; Doric, White Star-Dominion Line, July 21; Montcalm, Canadian Pacific Steamships, Ltd., July 27; Coracero, Anchor-Donaldson Line, July 27; Canada, White Star-Dominion Line, July 28.

To London.—Canadian Challenger, Canadian Government Merchant Marine, July 4; Bawtry, Canadian Pacific Steamships, Ltd., July 7; Antonia, Cunard Line, July 7; Welland County, I.C. Transports, Ltd., July 14; Verentia, Cunard Line, July 14; Alleghany, Furness Line, July 14; Canadian Planter, Canadian Government Merchant Marine, July 18; Ausonia, Anchor-Donaldson Line, July 21; Brant County, I.C. Transports, Ltd., July 26; Andania, Anchor-Donaldson Line, July 28; Canadian Commander, Canadian Government Merchant Marine, Aug. 1.

To Manchester.—Manchester Shipper, July 5; Manchester Division, July 12; Manchester Brigade, July 19; Manchester Hero, July 26; Manchester Corporation, Aug. 2—all Manchester Lines, Ltd.

To Newcastle and Leith.—Cairnavon, July 6; Cairnmona, July 13; Cairngowan, July 20; Cairnross, July 27—all Thomson Line.

To Norwegian Ports.—Idefjord, Norwegian-American Line, July 14.

To Plymouth.—Antonia, July 7; Ausonia, July 21; Andania, July 28—all Anchor-Donaldson Line.

To Rotterdam.—West Kebar, Rogers & Webb, July 10; Welland County, I.C. Transports, Ltd., July 14; Kenbane Head, Head Line, July 15; Brant County, I.C. Transports, Ltd., July 26; Sinasta, Rogers & Webb, July 31.

To Southampton.—Minnedosa, July 3; Melita, July 18—both Canadian Pacific Steamships, Ltd.

To St. John's (Nfld.), via Charlottetown (P.E.I.).—Canadian Sapper, Canadian Government Merchant Marine, July 17, and fortnightly sailings.

To Brisbane, Sydney, Melbourne and Adelaide.—Trewyn, New Zealand Steamships Co., July 11.

To Auckland, Wellington, Lyttelton and Dunedin.—Trelevan, New Zealand Steamships Co., July 20.

To Melbourne, Sydney, Auckland, Wellington, Lyttelton and Dunedin.—Canadian Constructor, Canadian Government Merchant Marine, July 28.

To Hamilton (Bermuda), Nassau (Bahamas), Kingston (Jamaica), and Belize (British Honduras).—Canadian Fisher, July 6; Canadian Forester, July 27—both Canadian Government Merchant Marine.

To St. Kitts, Antigua, Barbados, Trinidad and Demerara.—Canadian Carrier, July 11; Canadian Otter, July 25—both Canadian Government Merchant Marine.

To Rio de Janeiro, Santos, Montevideo, Buenos Aires and Bahia Blanca.—Hilarius, Houston Line, July 1.

To South Africa.—Cochrane, Elder-Dempster & Co., July 15.

From Quebec

To Liverpool.—Regina, White Star-Dominion Line, July 7; Montlaurier, Canadian Pacific Steamships, Ltd., July 13; Megantic, July 14; Doric, July 21; Canada, July 28—all White Star-Dominion Line.

To Cherbourg, Southampton and Hamburg.—Empress of Scotland, July 7; Empress of France, July 21; Empress of Scotland, Aug. 4—all Canadian Pacific Steamships, Ltd.

From Halifax

To Bermuda, St. Kitts, Antigua, Montserrat, Dominica, St. Lucia, Barbados, St. Vincent, Grenada, Trinidad and British Guiana.—Royal Mail Steam Packet Co., July 6, and every fortnight.

To Santiago, Cuba, Kingston and Montego Bay.—Ottar, Pickford & Black, Ltd., July 11, Aug. 8.

From North Sydney, N.S.

To Newfoundland.—Kyle, Newfoundland Government Railway Commission, tri-weekly (Tuesday, Thursday and Saturday).

From Vancouver

To Bombay.—Canadian Britisher, Canadian Government Merchant Marine, Aug. 10.

To Liverpool, London, Rotterdam and Antwerp.—Loch Goil, early July; Cardiganshire, middle August—both Royal Mail Steam Packet Co.

To LONDON, ROTTERDAM AND ANTWERP.—Dinteldyk, Royal Mail Steam Packet Co., late July.

To HONOLULU, SUVA, AUCKLAND AND SYDNEY.—Niagara, Canadian-Australasian Royal Mail Line, Aug. 3.

To SYDNEY AND MELBOURNE.—Canadian Importer, Canadian Government Merchant Marine, July 30.

To LYTTELTON, DUNEDIN, BLUFF AND MELBOURNE.—Waikawa, Canadian-Australasian Royal Mail Line, July 18.

To AUCKLAND, MELBOURNE AND SYDNEY.—Wairuna, Canadian-Australasian Royal Mail Line, July 14.

To MELBOURNE, ADELAIDE AND SYDNEY.—Hauraki, Canadian-Australasian Royal Mail Line, Aug. 14.

To KOBE, SHANGHAI, HONG KONG AND MANILA.—Stuart Dollar, Canadian Robert Dollar Co., Aug. 15.

To YOKOHAMA AND KOBE.—Hakata Maru, July 13; Tokiwa Maru, Aug. 2—both Nippon Yusen Kaisha Line.

To YOKOHAMA, KOBE AND SHANGHAI.—Canadian Highlander, July 15; Canadian Freighter, Aug. 10—both Canadian Government Merchant Marine.

To YOKOHAMA, KOBE, SHANGHAI AND HONG KONG.—Empress of Australia, Canadian Pacific Steamships, Ltd., July 26.

To YOKOHAMA, KOBE, MOJI, DAIREN, SHANGHAI AND HONG KONG.—Hawaii Maru, July 8; Alabama Maru, July 18; Arabia Maru, Aug. 5—all Osaka Shosen Kaisha Line.

To YOKOHAMA, KOBE, NAGASAKI, SHANGHAI AND HONG KONG.—Empress of Russia, July 12; Empress of Asia, Aug. 9—both Canadian Pacific Steamships, Ltd.; Arizona Maru, Osaka Shosen Kaisha Line, Aug. 15.

To YOKOHAMA, KOBE, SHANGHAI, HONG KONG AND MANILA.—Harold Dollar, Canadian Robert Dollar Co., July 10.

To YOKOHAMA, KOBE, HONG KONG, MANILA, AND CEBU, P.I.—Achilles, July 12; Philoctetes, Aug. 2—both Blue Funnel Line.

From Victoria

To HONOLULU, SUVA, AUCKLAND AND SYDNEY.—Niagara, Canadian-Australasian Royal Mail Line, Aug. 4.

To MANILA (via Oriental Ports).—Admiral, Pacific Steamship Company, July 12, and every twelve days.

To YOKOHAMA, KOBE, SHANGHAI AND HONG KONG.—Empress of Australia, Canadian Pacific Steamships, Ltd., July 26.

To YOKOHAMA, KOBE, NAGASAKI, SHANGHAI AND HONG KONG.—Empress of Russia, Canadian Pacific Steamships, Ltd., July 12; Shidzuoka Maru, July 16; Yokohama Maru, Aug. 4—both Nippon Yusen Kaisha Line.

Canadian Manufacturers and Exporters are strongly advised to file all numbers of the "Commercial Intelligence Journal" for future reference, and to bind them with the Index at the end of each half year.

COMMERCIAL INTELLIGENCE SERVICE

(For List of Canadian Trade Commissioners and Commercial Agents, see back page)

SPECIAL CANADIAN REPRESENTATIVES

United Kingdom

Lucien Pacaud, Secretary to the Office of the High Commissioner for Canada in London, Kinnaird House, Pall Mall East, London, S.W. 1, England. *Cable Address, Dominion, London.*

France

Philippe Roy, Commissioner General, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Stadacona, Paris.*

United States

Department of External Affairs of Canada: M. M. Mahoney, representative, care of British Embassy, Washington.

ENLARGED CANADIAN TRADE INTELLIGENCE

Under an arrangement made by the Minister of Trade and Commerce with the Secretary of State for the Colonies, the services of the British Commercial Diplomatic Officers, as well as those of British Consuls, will be available for Canadian firms, who are at liberty to apply direct to them for information as to the possibilities of sale of Canadian products, the method under which business is conducted, and the best means of getting into touch with markets. The arrangement referred to applies to all countries in which Canada is not represented by her own Commercial Intelligence Service.

BRITISH TRADE COMMISSIONERS IN CANADA

Canadian importers and others desirous of obtaining information regarding the export trade of the United Kingdom and British manufacturers desirous of representation in Canada, are invited to communicate with the undermentioned:—

The Senior British Trade Commissioner in Canada, and Newfoundland, 285 Beaver Hall Hill, Montreal, Que. Telegraphic address: "Britcom."

The British Trade Commissioner (for Ontario), 24 Adelaide St. West, Toronto, Ont. Telegraphic address: "Toroncom."

The British Trade Commissioner (for British Columbia), 210 Winch Bldg., Vancouver. Telegraphic address: "Vancom."

The Officer-in-Charge, British Trade Commissioner's Office, 703 Union Bank Bldg., Winnipeg. Telegraphic address: "Wincom."

BRITISH TRADE COMMISSIONERS SERVICE

In connection with the British Trade Commissioners Service which is now established in British possessions overseas, the British Government has placed the services of the Trade Commissioners at the disposal of Canada, especially in those overseas British possessions where Canada has no representatives of its own.

COMMERCIAL INTELLIGENCE SERVICE

Canadian Trade Commissioners and Commercial Agents should be kept supplied with catalogues, price lists, discount rates, etc., and the names and addresses of trade representatives by Canadian exporters. Catalogues should state whether prices are at factory point, f.o.b. at port of shipment, or, which is preferable, c.i.f. at foreign port.

The Canadian Government Trade Commissioners at the present time are using Bentley's Complete Phrase code.

CANADIAN TRADE COMMISSIONERS

Argentine Republic

B. S. Webb, Reconquista No. 46, Buenos Aires. *Cable Address, Canadian.*

Australia

D. H. Ross. Address for letters—Box 140 G. P. O., Melbourne. Office—Stock Exchange Building, Melbourne. *Cable Address, Canadian.*

Belgium

A. Stuart Bleakney, 98 Boulevard Adolphe Max, Brussels. *Cable Address, Canadian.*

Brazil

E. L. McColl. Address for letters—Caixa Postal 2164, Rio de Janeiro; office, Avenida Rio Branco, 9. *Cable Address, Canadian.*

British West Indies

E. H. S. Flood, Bridgetown, Barbados; agent also for British Guiana. *Cable Address, Canadian.*

China

J. W. Ross. Address for letters—P.O. Box 300. Office—Laidlaw Building, Szechuen and Nanking Roads, Shanghai. *Cable Address, Cancoma.*

Cuba

Address: 400 and 401 Teniente Rey 11, Havana. (Post Office Box 1290.) *Cable Address, Cantracom.*

France

Hercule Barré, 17 and 19 Boulevard des Capucines, Paris. *Cable Address, Cancomac.*

Germany

L. D. Wilgress, Raboisen 8, Hamburg 1. *Cable Address, Mapleleaf.* (Territory covers Germany, Russia, the countries on the eastern shore of the Baltic, Poland and Czecho-Slovakia.)

Holland

Norman D. Johnston, Zuidblaak 26, Rotterdam, *Cable Address, Watermill.*

India and Ceylon

H. A. Chisholm, P.O. Box 2003, Calcutta. *Cable Address, Canadian.*

Italy

W. McL. Clarke, Via Carlo Cattaneo 2, Milan. *Cable Address, Canadian.*

Jamaica

G. R. Stevens, 17 Port Royal street, Kingston. (Territory covers Jamaica, Cuba, and the other countries bordering on the Caribbean sea.) *Cable Address, Cantracom.*

Japan

A. E. Bryan, P.O. Box 109; office, 51-B Main street, Yokohama. *Cable Address, Canadian.*

Mexico

C. Noel Wilde. Address for letters, Apartado Num. 126-bis, Mexico City. Office, Edificio Banco de Londres y Mexico, Num. 30. *Cable Address, Cancoma.*

New Zealand

W. A. Beddoe, Union Buildings, Customs street, Auckland. *Cable Address, Canadian.*

South Africa

W. J. Egan, P.O. Box 683; office, Westminster House, Adderly street, Cape Town. *Cable Address, Cantracom.*

Straits Settlements

A. B. Muddiman, P.O. Box 121, Singapore. (Territory covers Straits Settlements. British Borneo, Netherlands East Indies, and Siam.) *Cable Address, Canadian.*

United Kingdom

Harrison Watson, 73 Basinghall street, London, E.C.2, England. *Cable Address, Sleighing, London.*

J. E. Ray, 4 St. Ann's Square, Manchester. *Cable Address, Cantracom.*

J. Forsyth Smith, Century Bldgs., 31 North John street, Liverpool. *Cable Address, Cantracom.*

Douglas S. Cole, Acting Trade Commissioner, Sun Building, Clare street, Bristol. *Cable Address, Canadian.*

Gordon B. Johnson, 87 Union street, Glasgow, Scotland. (Territory covers Scotland and Ireland.) *Cable Address, Cantracom.*

United States

Frederic Hudd, 44 Whitehall street, New York City. *Cable Address, Cantracom.*

CANADIAN COMMERCIAL AGENTS

Australia

B. Millin, The Royal Exchange Building, Sydney, N.S.W.

Norway and Denmark

C. E. Sontum, Grubbegd, N. 4, Christiania, Norway. *Cable Address, Sontums.*

British West Indies

T. Geddes Grant, 911 Broadway, Port of Spain, Trinidad.

INDEX

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